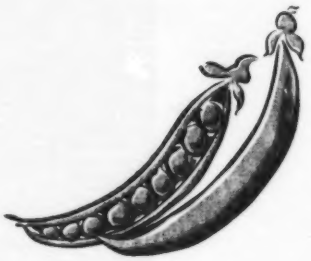
Manitoba Agriculture and Food

Program & Policy Analysis

2000 Manitoba Pulse, Forage & Specialty Crops Industry Profiles



CONTENTS

Pages

- BUCKWHEAT SECTOR 1-8

- CANARY SEED SECTOR 9-16

- DRY BEAN SECTOR 17-24

- DRY PEA SECTOR 25-32

- LENTIL SECTOR 33-40

- MUSTARD SEED SECTOR 41-48

- FORAGE SECTOR 49-56

N/A = not available

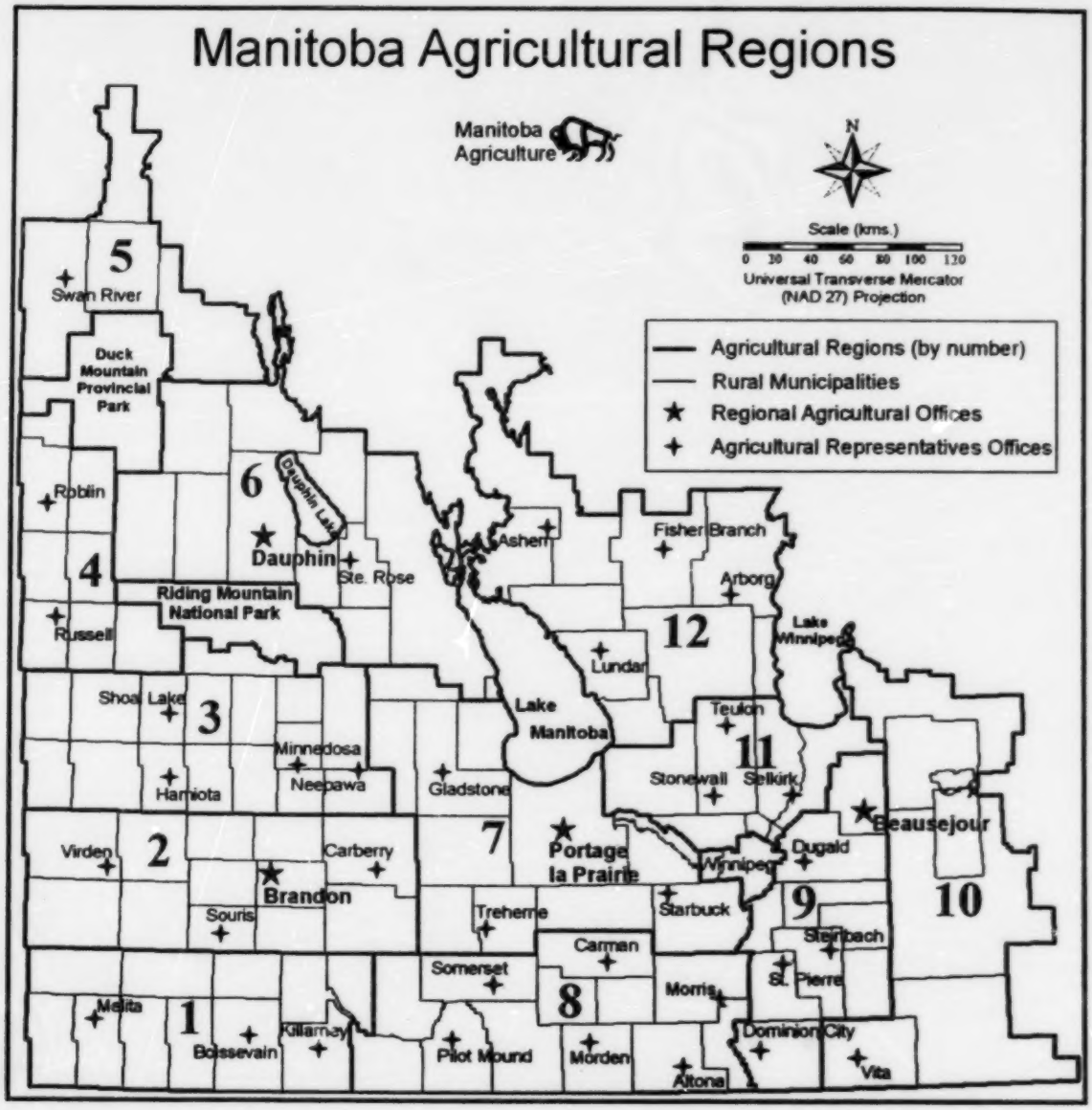
Data sources: *Agriculture and Agri-Food Canada*
Manitoba Agriculture and Food
Statistics Canada

For further information, please contact:

Market Analysis & Statistics Section
Program and Policy Analysis Branch

Phone: (204) 945-4017 or 945-2364
Fax: (204) 948-2844
e-mail: cgunvaldsen@gov.mb.ca or jhoney@gov.mb.ca

September, 2001



Administrative Region Name	Agricultural Region Numbers
Southwest	1, 2, 3
Northwest	4, 5, 6
Central	7, 8
Eastern/Interlake	9, 10, 11, 12

BUCKWHEAT SECTOR

BUCKWHEAT SECTOR PROFILE

Production:

No buckwheat production was recorded in Manitoba prior to 1925 when 9,400 acres produced 97,000 bushels of buckwheat. The seeded area fell to just over 2,000 acres in the late 1940s, but rose to 61,800 acres in 1956. The crop declined in popularity in the next decade, but by 1970, the seeded area had risen to 80,000 acres. The area planted to buckwheat peaked at 135,000 acres in 1979 following the record production of 2.7 million bushels in 1978. Plagued by adverse weather, buckwheat yields declined in the early 1990s and only 15,000 acres were harvested in 1993. Yields improved in 1995 and 1996 to 21.0 and 23.3 bushels per acre respectively, but declined to 15.0 bushels per acre in 2000, which was below the 10-year average of 16.8 bushels per acre. In the late-1990s, competition in the Japanese market from lower-priced Chinese-grown buckwheat discouraged producers from planting larger areas of buckwheat.

Harvested area, production and farm value of the crop in 2000 were 30,000 acres, 450,000 bushels and $3.0 million respectively, compared to 25,000 acres, 400,000 bushels and $2.6 million in 1999. Manitoba continues to be the "Buckwheat Capital of Canada" even though only 72 percent of the Canadian crop was produced in the province in 2000 compared to almost 90 percent in 1981. Other buckwheat-producing provinces are Ontario, Quebec and, in some years, Saskatchewan.

Average buckwheat prices have ranged between $3.40 and $8.40 per bushel since 1973. The average price of $6.74 per bushel for the 2000 crop was up by 2.9 percent from the average price of $6.55 per bushel the previous year.

Marketing:

Manitoba producers deliver buckwheat to cleaning plants, where foreign material is removed and the seed cleaned and graded to export standard. The seed is shipped by truck or rail for export. Small amounts are sold through Winnipeg companies to local consumers.

Processing:

Buckwheat is bagged and sold by companies, such as Agricore Special Crops in Carman (X-Can Grain Pool Ltd exports buckwheat) and Keystone Grain Ltd. in Winkler, or ground into whole or coarse buckwheat grits and bagged by W.H. Escott Co. Ltd. in Winnipeg. Vita Health Co. in Winnipeg markets consumer-sized bags of buckwheat flour and hulled buckwheat.

Trade:

Most of Manitoba's buckwheat exports, valued at $2.5 million in 2000, were shipped to Japan, United States, Thailand and Hungary. Although about half of Manitoba's exports in 1995 were purchased by Japan for processing into soba noodles, the Japanese share of buckwheat exports declined to 29 percent in 1996, but increased back to 80 percent of exports in 1999 and 50 percent in 2000.

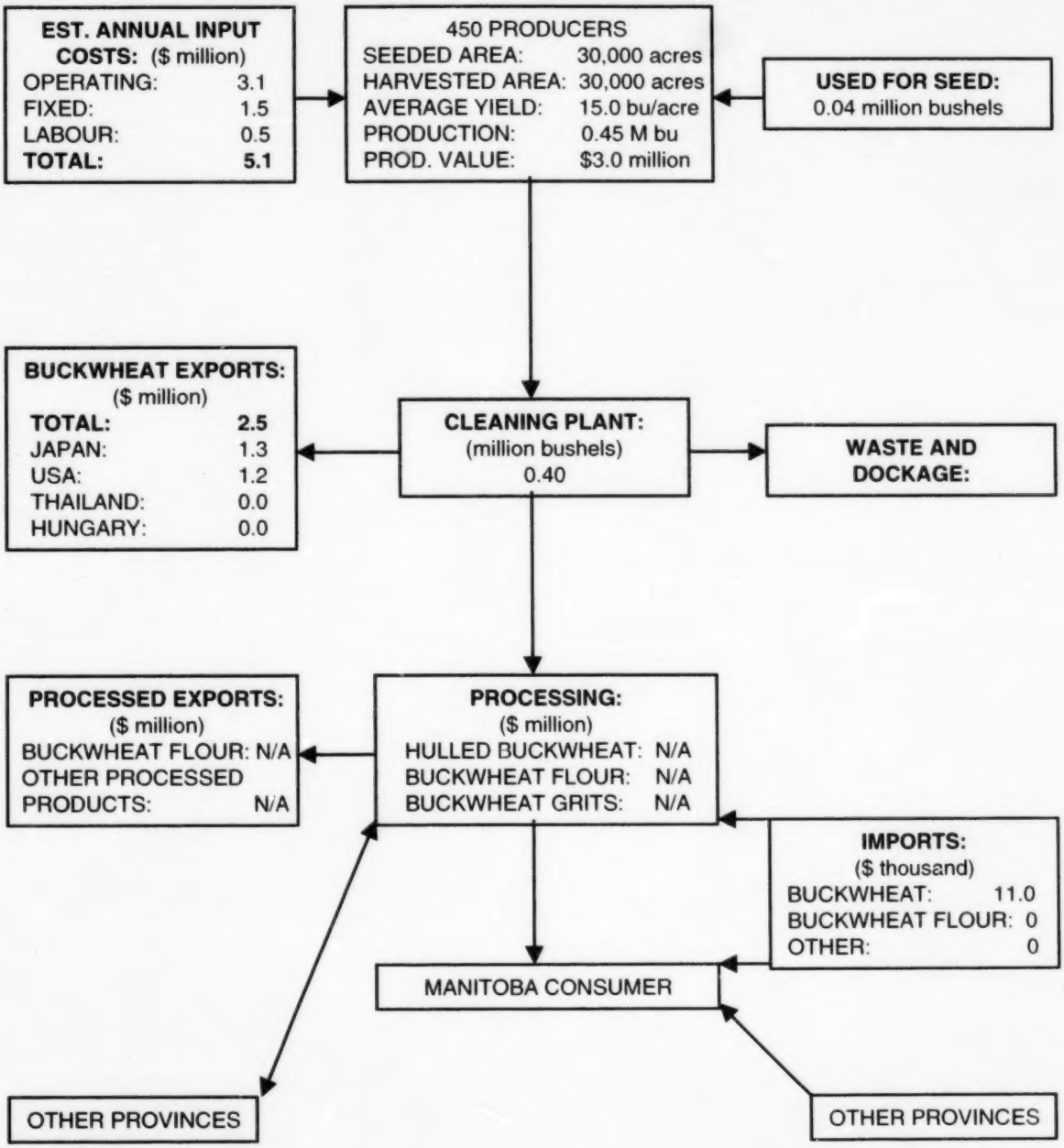
Manitoba imported about $11,000 of buckwheat in 2000, mostly from the United States. Much of this was grown under contract to Manitoba firms.

BUCKWHEAT SECTOR

	1997	1998	1999	2000[P]	'00 as a % of '99
Estimated Number of Farms	420	420	420	450	107
CROP PRODUCTION:					
Seeded Area ('000 acres):	25	30	25	30	120
% of Canada	63.8	82.2	72.5	75.9	
Harvested Area ('000 acres):	25	30	25	30	120
Yield/acre (bushels)	18.0	16.7	16.0	15.0	89
Production (thousand bu):	450	500	400	450	113
% of Canada	59.3	73.7	69.6	71.9	
Average Price ($/bu):	7.29	7.91	6.55	6.74	103
VALUE OF PRODUCTION ($ million):	3.3	4.0	2.6	3.0	115
ESTIMATED TOTAL EXPENSES ($/acre):	161.06	164.36	170.03	169.37	100
EXPORTS ($ million):	4.8	1.8	2.0	2.5	125
Unprocessed	4.8	1.8	2.0	2.5	125
Processed	0	0	0	0	
IMPORTS ($ thousand):	54.4	78.3	58.6	11.0	19
Unprocessed	54.4	78.3	58.6	11.0	19
Processed	0	0	0	0	

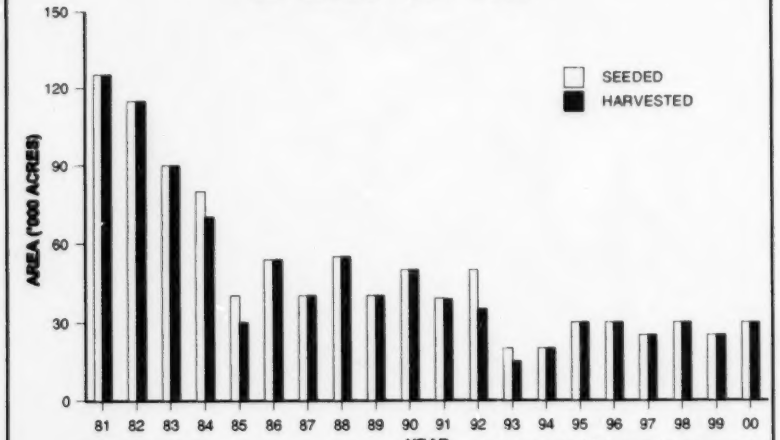
102-00604

BUCKWHEAT INDUSTRY CHART, 2000

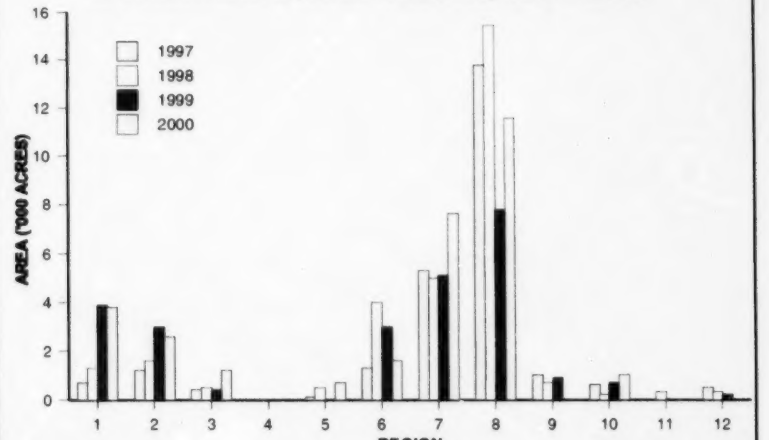


DATA SOURCE: Manitoba Agriculture & Food, Statistics Canada, Agriculture & Agri-Food Canada

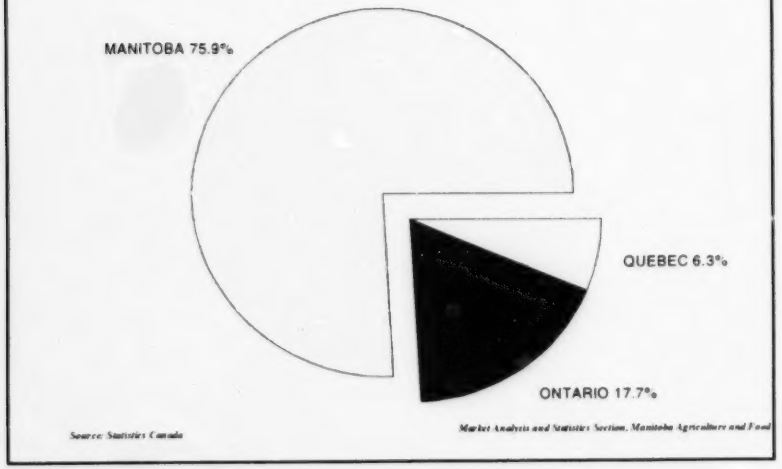
SEEDED & HARVESTED AREA OF BUCKWHEAT BY YEAR, 1981- 2000



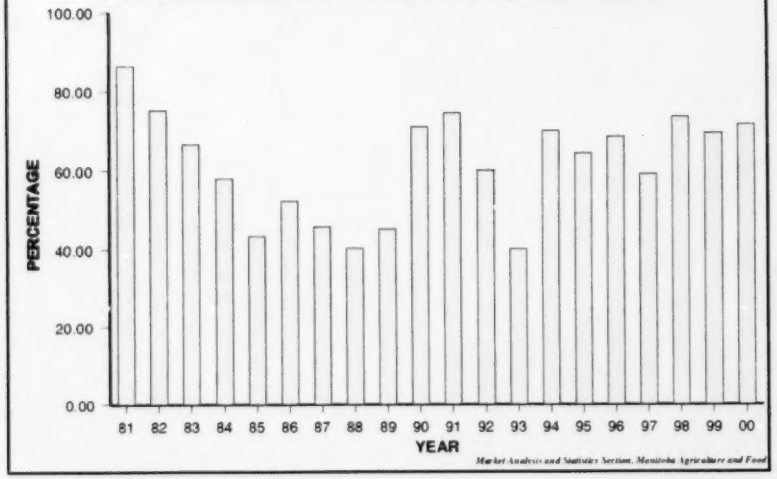
SEEDED AREA OF BUCKWHEAT BY AGRICULTURAL REGION, 1997- 2000

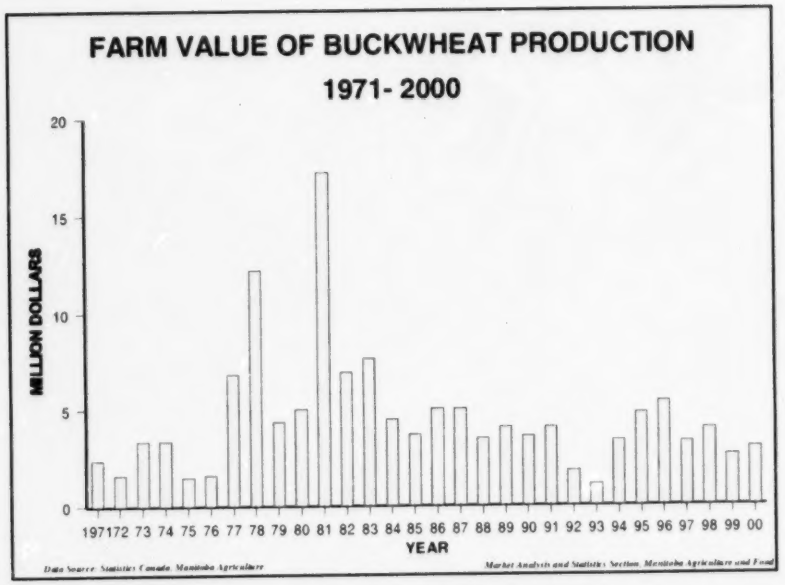


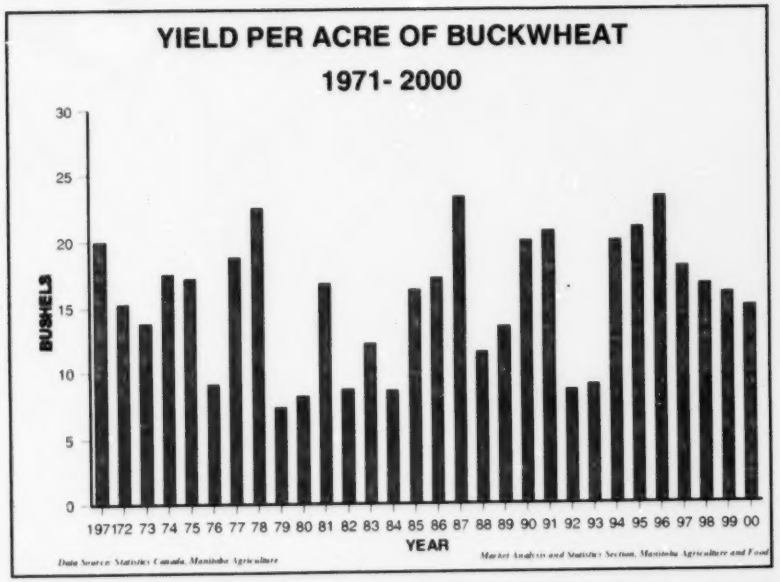
AREA OF BUCKWHEAT SEEDED BY PROVINCE, 2000

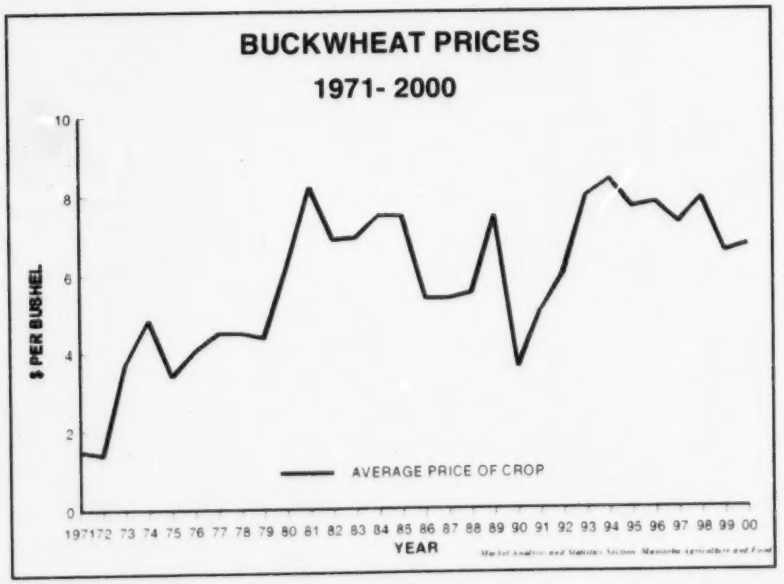


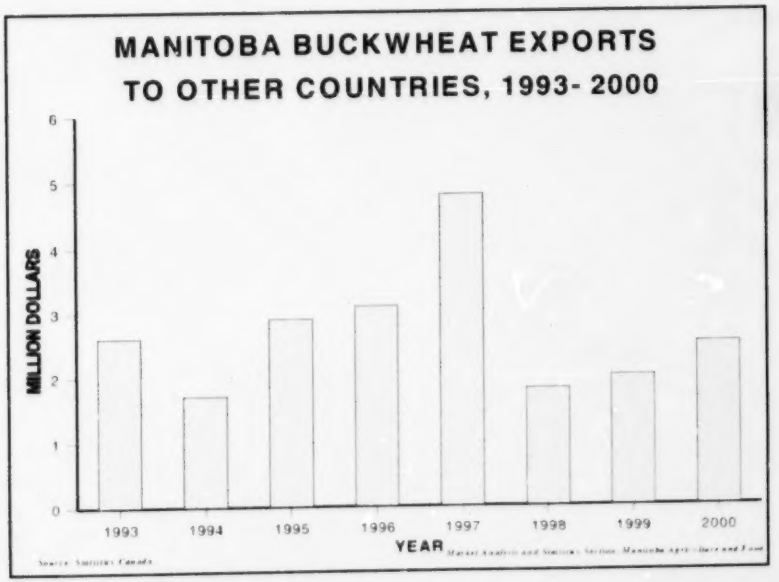
BUCKWHEAT PRODUCTION AS A PERCENTAGE OF CANADIAN PRODUCTION, 1981- 2000

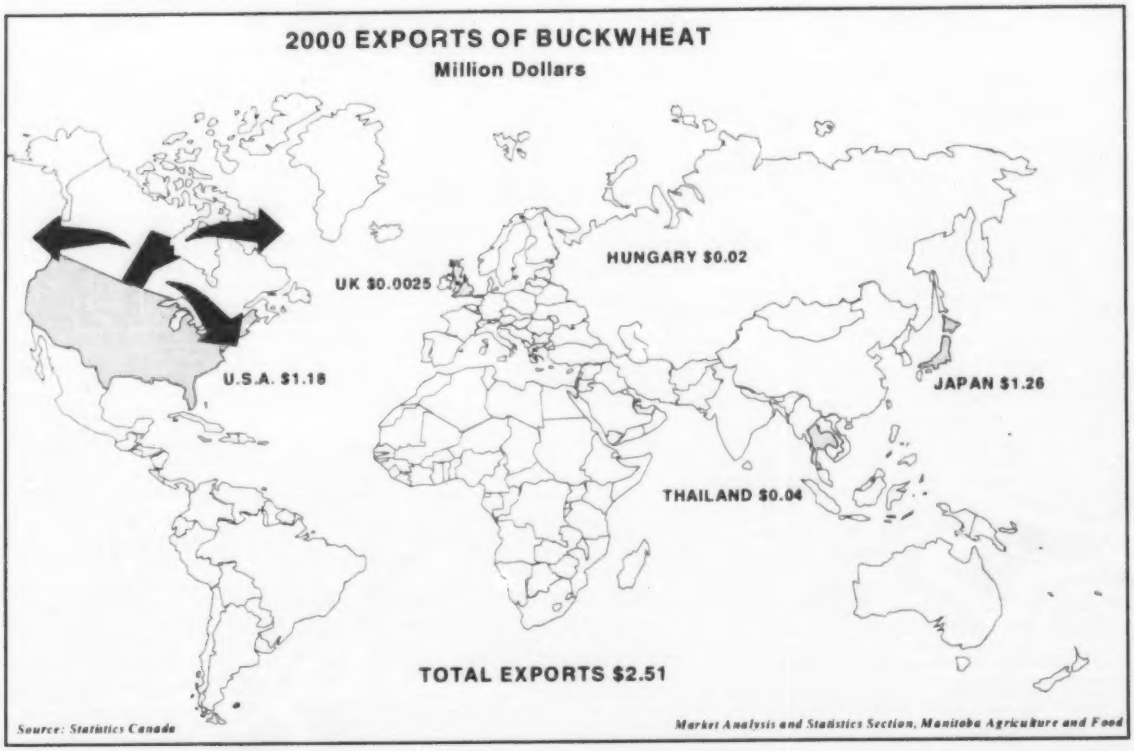


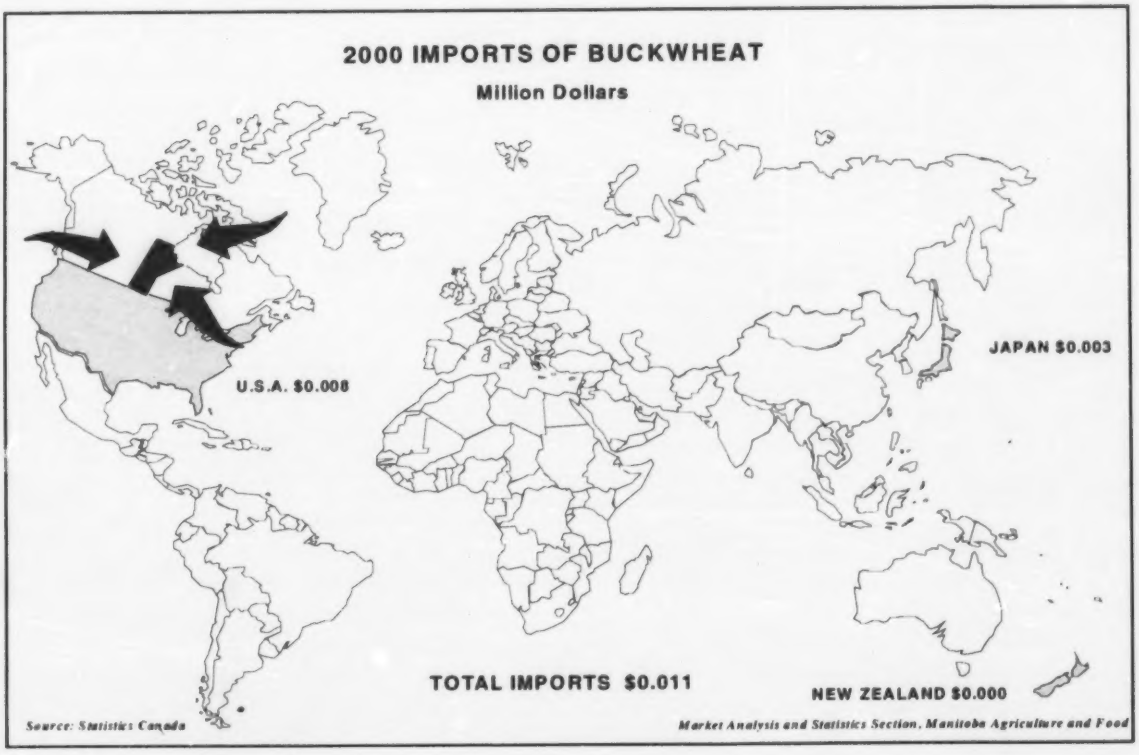

FARM VALUE OF BUCKWHEAT PRODUCTION
1971- 2000
MILLION DOLLARS
20
15
10
5
0
1971 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food


YIELD PER ACRE OF BUCKWHEAT
1971- 2000
BUSHELS
30
25
20
15
10
5
0
1971 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food


BUCKWHEAT PRICES
1971- 2000
$ PER BUSHEL
10
8
6
4
2
0
AVERAGE PRICE OF CROP
1971 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food


MANITOBA BUCKWHEAT EXPORTS
TO OTHER COUNTRIES, 1993- 2000
MILLION DOLLARS
6
5
4
3
2
1
0
1993
1994
1995
1996
1997
1998
1999
2000
YEAR
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2000 EXPORTS OF BUCKWHEAT
Million Dollars
HUNGARY $0.02
UK $0.0025
U.S.A. $1.18
JAPAN $1.26
THAILAND $0.04
TOTAL EXPORTS $2.51
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2000 IMPORTS OF BUCKWHEAT
Million Dollars
U.S.A. $0.008
JAPAN $0.003
TOTAL IMPORTS $0.011
NEW ZEALAND $0.000
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

CANARY SEED SECTOR

CANARY SEED SECTOR PROFILE

Production:

Canary seed production was first recorded in Manitoba in 1963 when 1,500 acres were harvested and 800,000 pounds produced. The seeded area rose in the 1960s and 1970s, doubling to 15,000 acres from 1976 to 1977. The area planted to canary seed was up to 57,000 acres in 1986, but dropped significantly in 1987 because of low prices. Interest in canary seed production continued to wane until 1993 when only 12,000 acres were seeded, but higher prices in 1994 and 1995 encouraged producers to increase the canary seed area to 30,000 acres in those years. In 1996, the area seeded to canary seed more than doubled to a record 65,000 acres, but declined to 20,000 acres in 1997 and 15,000 acres in 1999 due to the price drop in 1996 and again in 1998. The seeded and harvested area increased back to 40,000 acres in 2000.

Average crop yields ranged from 500 pounds per acre in 1974 to over 1,330 pounds per acre in 1990. The average yield in 2000, at 950 pounds per acre, was down by 15 percent from 1999 and 13.6 percent below the 10-year average of 1,010 pounds per acre.

The 2000 crop of 38.0 million pounds was valued at $4.25 million compared to 16.8 million pounds valued at $1.85 million in 1999 and a record 74.2 million pounds valued at $11.1 million in 1996. Manitoba, one of three provinces growing canary seed, produced 10.1 percent of the Canadian crop in 2000, up from 4.6 percent in 1999. The major canary seed-producing province is Saskatchewan with smaller amounts being grown in Alberta.

Average prices for the canary seed crop have ranged between $0.07 and $0.20 per pound since 1973. The average price of $0.112 per pound for the 2000 crop was up by 1.8 percent from the previous year's price.

Marketing:

Most of the canary seed is delivered to a cleaning plant in Thunder Bay, where foreign material is removed and the seed cleaned to 98 percent purity (5 percent hulled) for export. The seed is loaded on ships for transportation to Western Europe. Some of the canary seed crop is cleaned by Manitoba plants and shipped directly to the United States and South America. Small amounts are sold to companies in Eastern Canada, from where packaged seed is sent back to Manitoba for the domestic birdseed market.

Processing:

Companies, such as Roy Legumex Inc. in St. Jean-Baptiste and XCAN Grain Pool Ltd., clean and bag canary seed. Some canary seed is mixed with other seed and sold as mixed birdseed in Manitoba.

Trade:

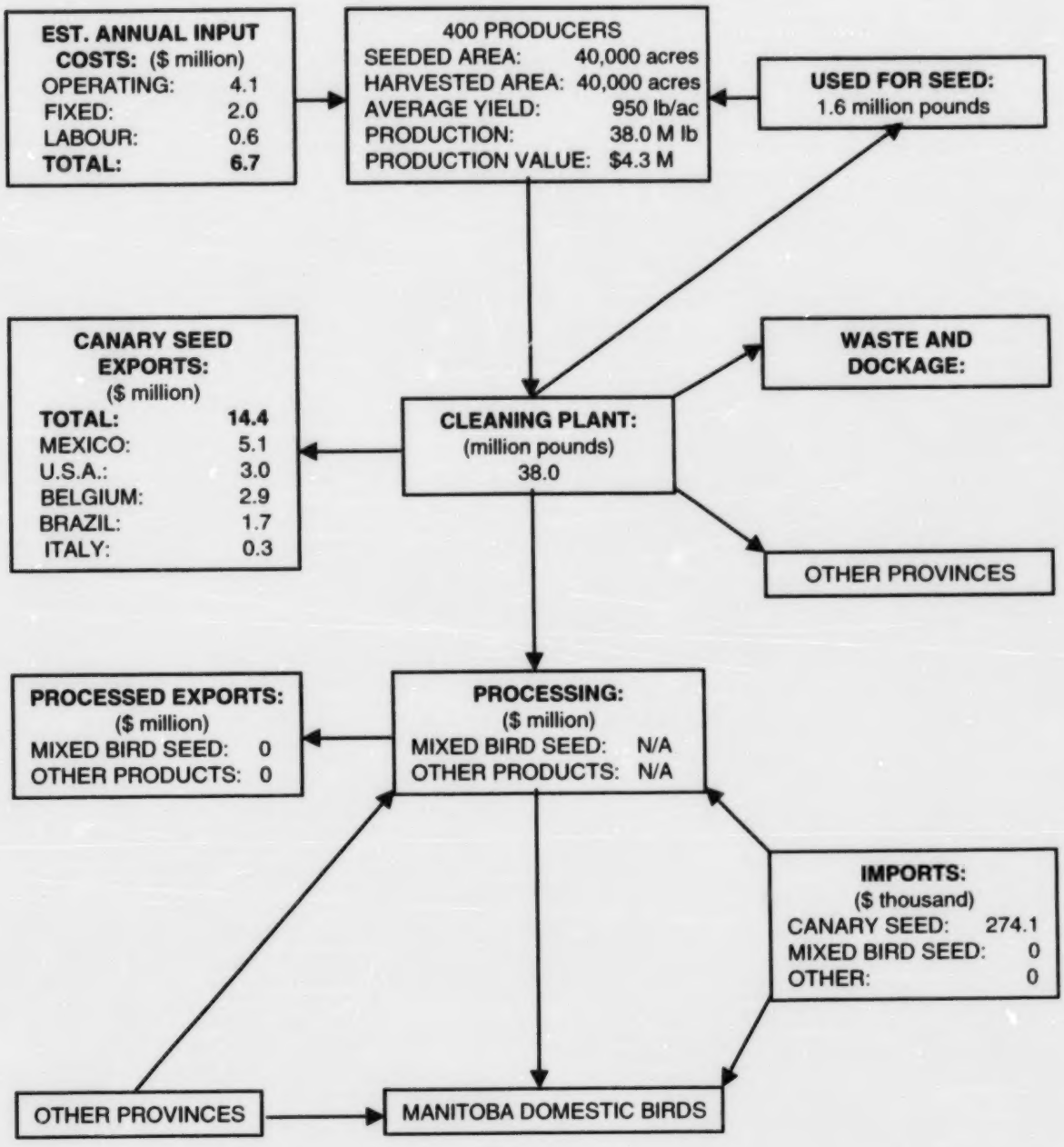
In 2000, Manitoba canary seed was exported to 34 countries, such as Mexico, the United States, Belgium, Brazil and Italy. About 28 percent of Manitoba's exports, valued at $14.4 million, went to Western Europe in 2000, down from almost two-thirds in 1997.

Manitoba imported a small amount of canary seed from the United States, valued at $274,100 in 2000.

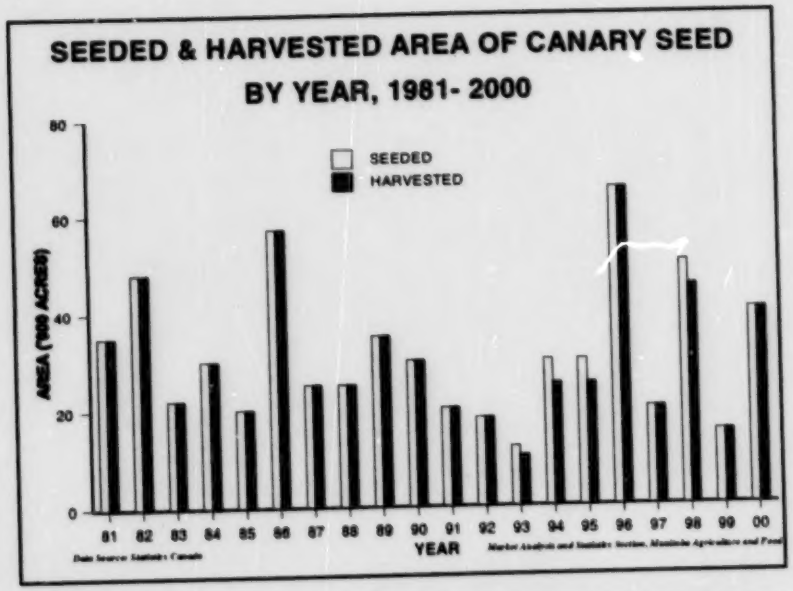
CANARY SEED SECTOR

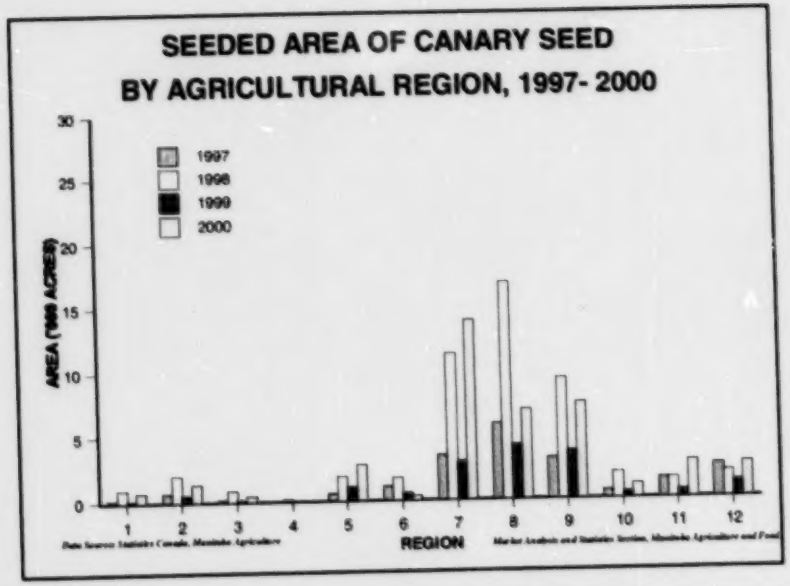
	1997	1998	1999	2000[P]	'00 as a % of '99
Estimated Number of Farms	200	400	200	400	200
CROP PRODUCTION:					
Seeded Area ('000 acres):	20.0	50.0	15.0	40.0	267
% of Canada	7.1	9.6	4.1	9.8	
Harvested Area ('000 acres):	20.0	45.0	15.0	40.0	267
Yield/acre (pounds)	1,020	1,218	1,120	950	85
Production (million lb):	20.3	54.8	16.8	38.0	226
% of Canada	8.0	10.6	4.6	10.1	
Average Price ($/lb):	0.147	0.115	0.110	0.112	102
VALUE OF PRODUCTION ($ million):	2.99	6.40	1.85	4.25	230
ESTIMATED TOTAL EXPENSES ($/acre):	161.20	164.82	172.64	168.74	98
CASH RECEIPTS ($ million):	4.4	4.0	3.3	2.8	85
% of Canada	9.1	9.9	8.2	8.1	
EXPORTS ($ million):	16.9	12.6	14.8	14.4	97
Cleaned Canary Seed	16.9	12.6	14.8	14.4	97
Mixed bird seed	0	0	0	0	
IMPORTS ($ thousand):	1.8	83.3	47.4	274.1	578
Cleaned Canary Seed	1.8	83.3	47.4	274.1	578
Mixed bird seed	0	0	0	0	

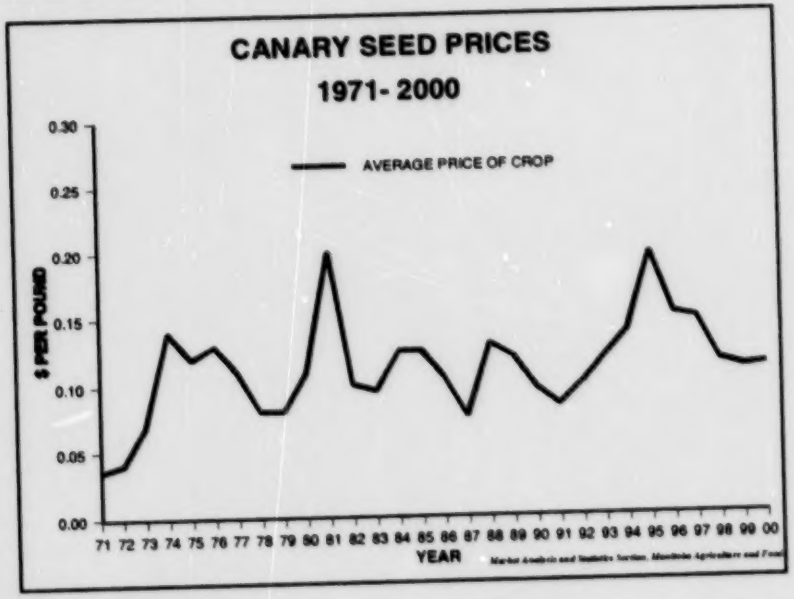
CANARY SEED INDUSTRY CHART, 2000

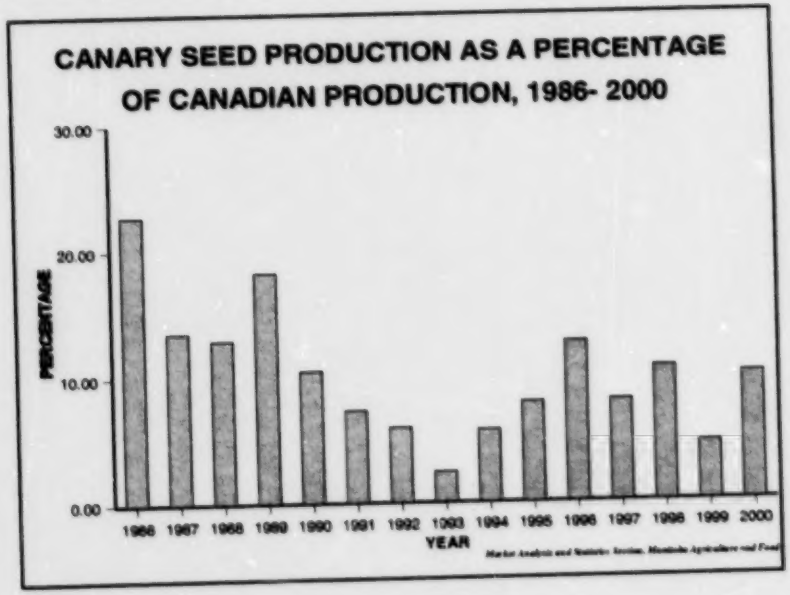


DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

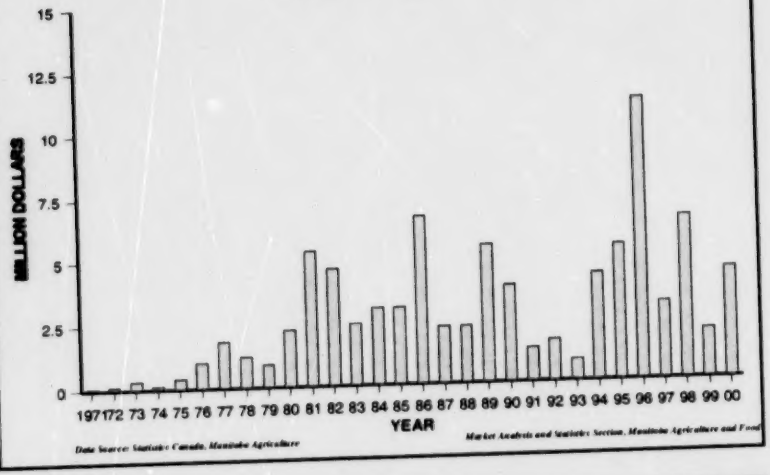

SEEDED & HARVESTED AREA OF CANARY SEED
BY YEAR, 1981- 2000
SEEDED
HARVESTED
AREA ('000 ACRES)
0
20
40
60
80
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR


SEEDED AREA OF CANARY SEED
BY AGRICULTURAL REGION, 1997- 2000
1997
1998
1999
2000
AREA ('000 ACRES)
0
5
10
15
20
25
30
1 2 3 4 5 6 7 8 9 10 11 12
REGION

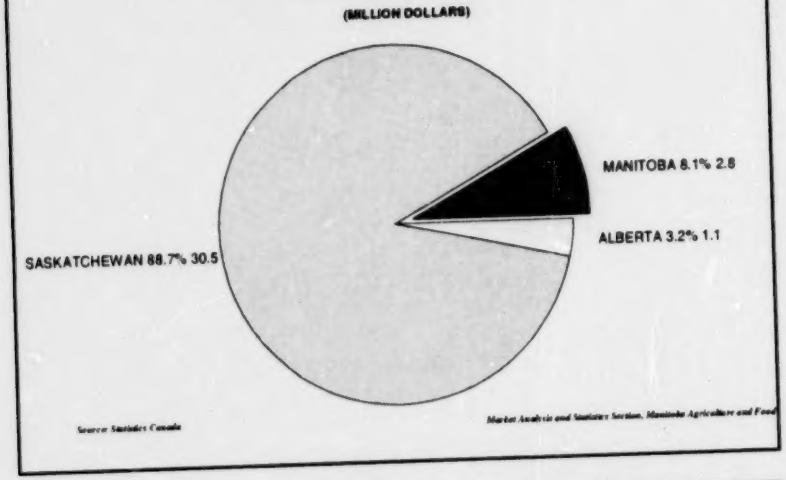

CANARY SEED PRICES
1971- 2000
AVERAGE PRICE OF CROP
$ PER POUND
0.00
0.05
0.10
0.15
0.20
0.25
0.30
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR


CANARY SEED PRODUCTION AS A PERCENTAGE
OF CANADIAN PRODUCTION, 1986- 2000
PERCENTAGE
0.00
10.00
20.00
30.00
1986 1987 1988 1989 1990 1991 1992 1993 1994 1995 1996 1997 1998 1999 2000
YEAR

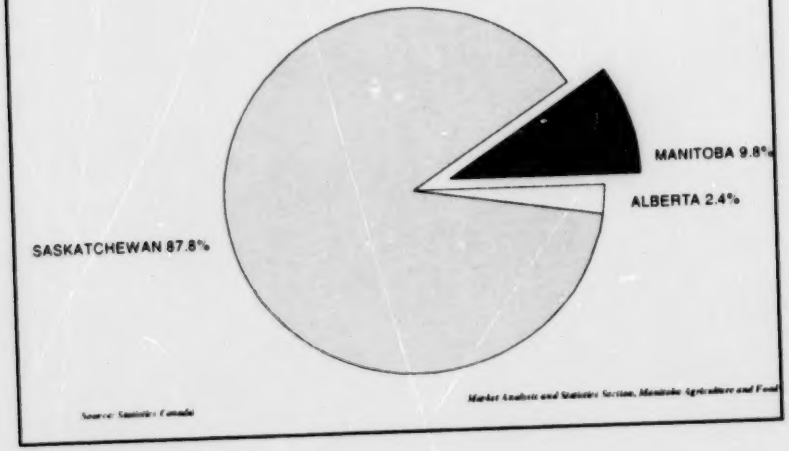
FARM VALUE OF CANARY SEED PRODUCTION 1971- 2000



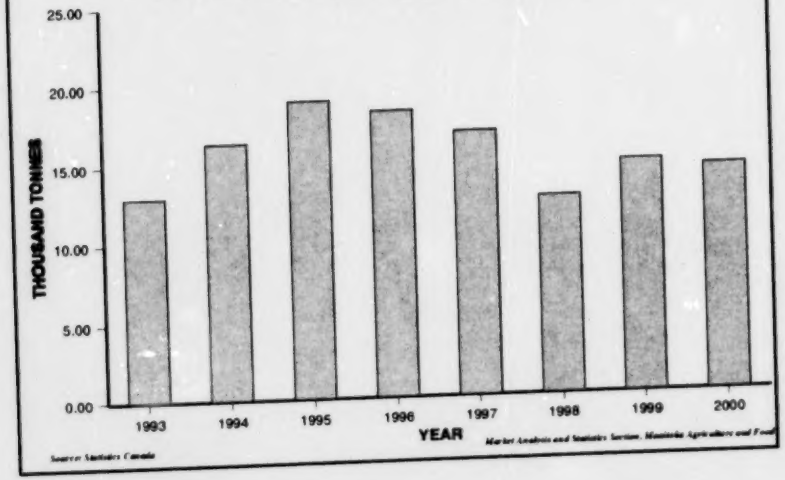
FARM CASH RECEIPTS FROM CANARY SEED BY PROVINCE, 2000

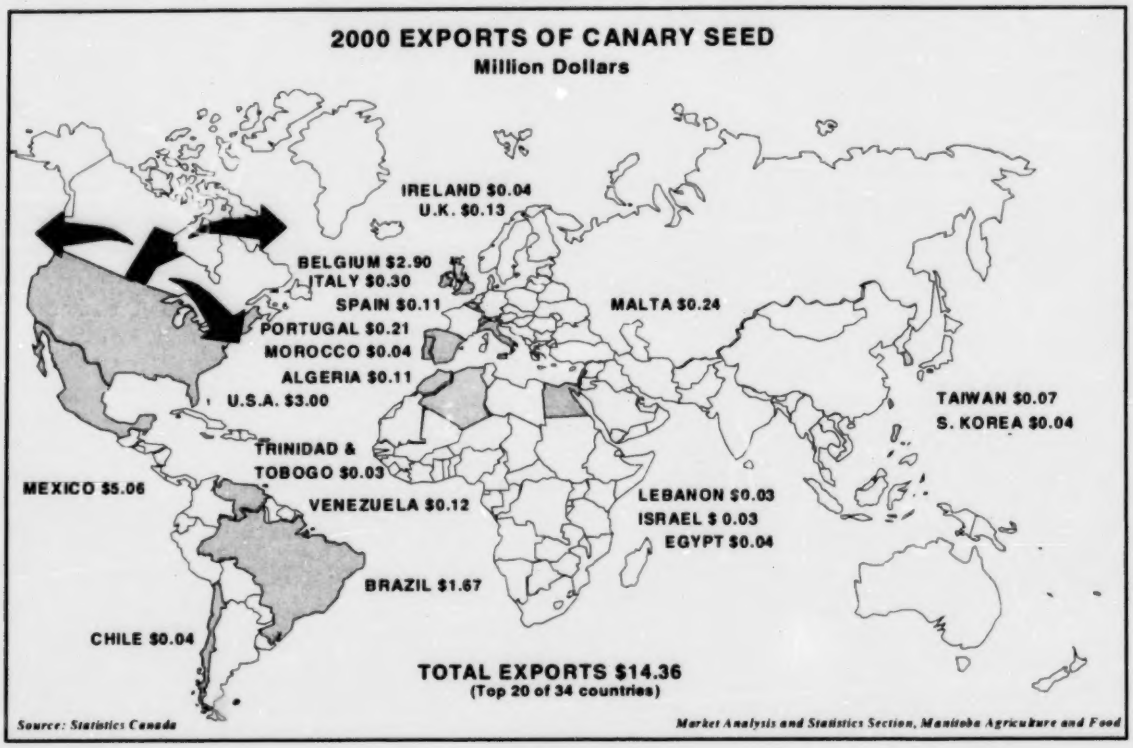


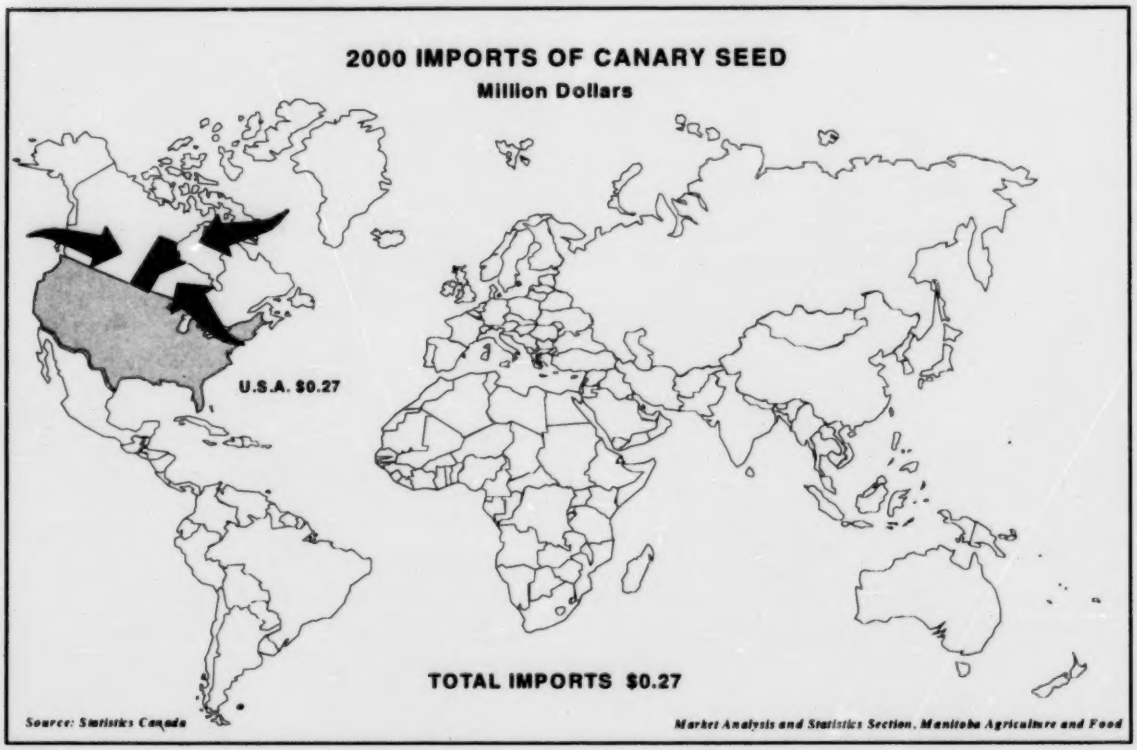
AREA OF CANARY SEED SEEDED BY PROVINCE, 2000



MANITOBA CANARY SEED EXPORTS TO OTHER COUNTRIES, 1993- 2000




2000 EXPORTS OF CANARY SEED
Million Dollars
IRELAND $0.04
U.K. $0.13
BELGIUM $2.90
ITALY $0.30
SPAIN $0.11
PORTUGAL $0.21
MOROCCO $0.04
ALGERIA $0.11
U.S.A. $3.00
MALTA $0.24
TAIWAN $0.07
S. KOREA $0.04
TRINIDAD &
TOBOGO $0.03
MEXICO $5.06
VENEZUELA $0.12
LEBANON $0.03
ISRAEL $ 0.03
EGYPT $0.04
BRAZIL $1.67
CHILE $0.04
TOTAL EXPORTS $14.36
(Top 20 of 34 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2000 IMPORTS OF CANARY SEED
Million Dollars
U.S.A. $0.27
TOTAL IMPORTS $0.27
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

DRY BEAN SECTOR

DRY BEAN SECTOR PROFILE

Production:

Commercial production of dry beans began in the mid-1960s in Manitoba with 100 acres seeded and harvested in 1963. By 1981, the seeded area had increased to 19,300 acres with further significant increases occurring in the mid-1990s. There are agronomic benefits to dry bean production as well as net returns, which are at least comparable to wheat production. A record 230,000 acres of dry beans were harvested in 2000, an increase of 25 percent from the previous record in 1999, when the harvested area was 170,000 acres. About 53 percent of the bean area was seeded to white pea/navy beans with most of the remaining area seeded to pinto beans and smaller areas in dark red kidney, cranberry or black beans.

Average dry bean yields were highest at 1,670 pounds per acre in 1994. Yields, averaged 1,580 pounds per acre in 1999, but were down 11 percent to 1,410 pounds per acre in 2000. The 10-year average yield was 1,325 pounds per acre.

Production and crop value peaked in 2000 at 325.0 million pounds and $61.2 million respectively, up from 268.0 million pounds and $57.2 million in 1999. These were well above the 10-year averages of 121 million pounds and $27 million.

Manitoba, the largest producer of dry beans in the country, produced 56.3 percent of the Canadian dry bean crop in 2000, up from 29.7 percent in 1997. About one quarter of the national dry bean crop is grown in Ontario. Most of the remainder is produced in Alberta with smaller amounts in Quebec. Ontario focuses on white pea beans, while Alberta grows coloured beans.

Over the last twenty years, average dry bean prices have ranged between $0.15 and $0.40 per pound. The average price of $0.19 per pound for the 2000 crop was down from $0.21 per pound the previous year.

Marketing:

Annual farm cash receipts for the sector rose from $13.6 million in 1996 to $62.3 million in 2000. Manitoba's contribution to Canadian dry bean receipts increased from 7.5 percent in 1993 to almost 40 percent in 1994, declined to 23 percent in 1995, but rose to 52.5 percent in 2000.

In 2000, Manitoba marketed white pea/navy beans (63% of Canadian crop), pinto beans (58% of Canadian area), dark red kidney beans (28%), light red kidney beans (53%), cranberry beans, also called romano, speckled or sugar beans, (14%), small red, red Mexican beans (33%) and black or black turtle beans (76%), all for human consumption.

Processing:

Companies such as Agricore East, Berdex Canada Ltd., Bison Commodities, Duncan Seeds, Finora Canada Ltd., Global Grain Canada, H & W Seed Service, Keystone Grain, Linear Grain, Northern Sales Ltd., Parent Seeds Ltd., Roy Legumex Inc., R.T. Stow Ltd., W.G. Thompson & Sons and XCAN Grain Ltd. are dry bean crop buyers.

Trade:

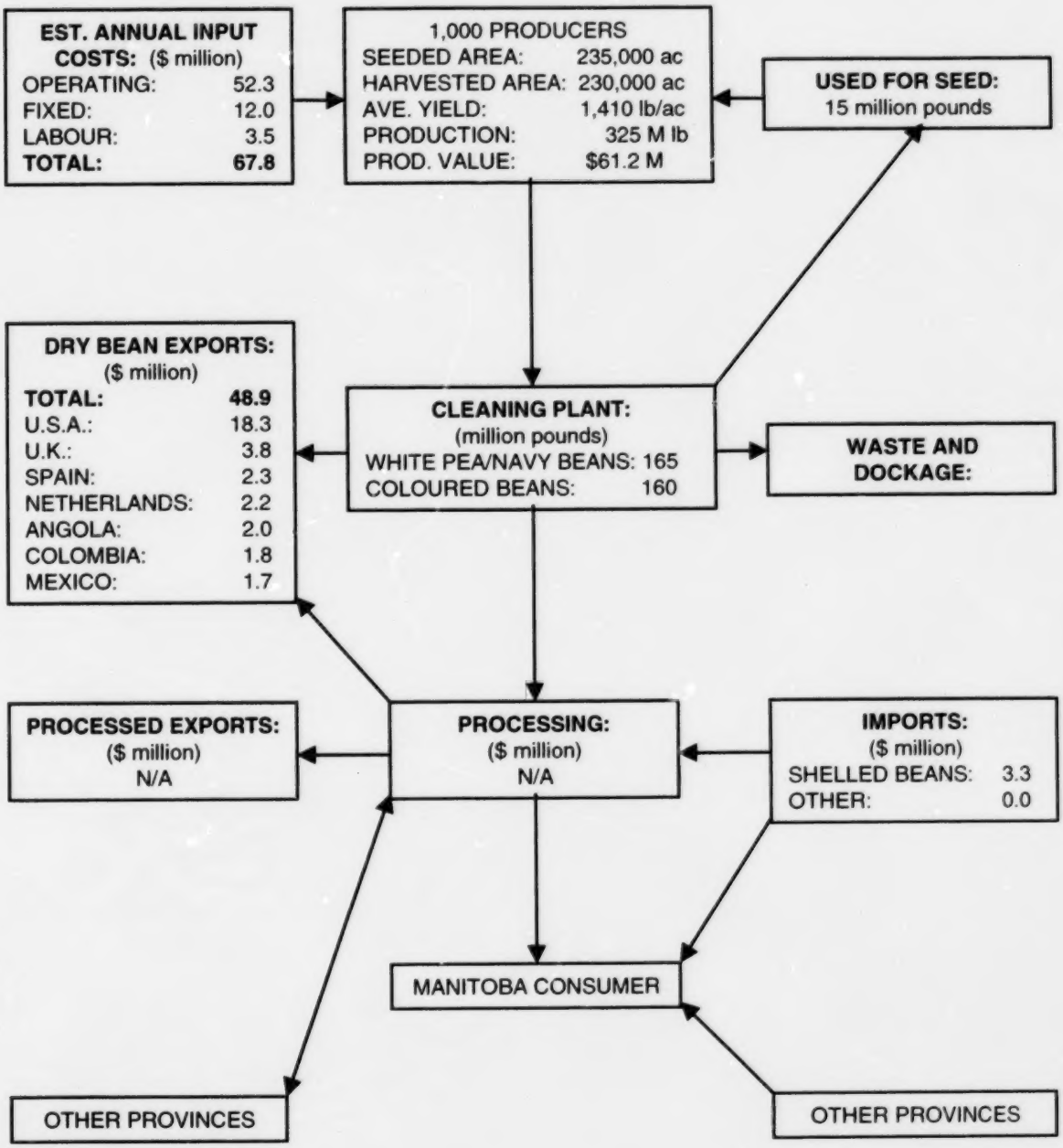
Manitoba's beans may be shipped to canneries in Eastern Canada for processing into products such as soups and pork and beans, but most beans are exported. About $48.9 million of the dry beans sold out of province in 2000 were exported to 55 countries such as the United States, the United Kingdom, Spain, the Netherlands, Angola, Colombia and Mexico.

Manitoba imported about $3.3 million of dry beans in 2000, mostly from the U.S. primarily for planting seed.

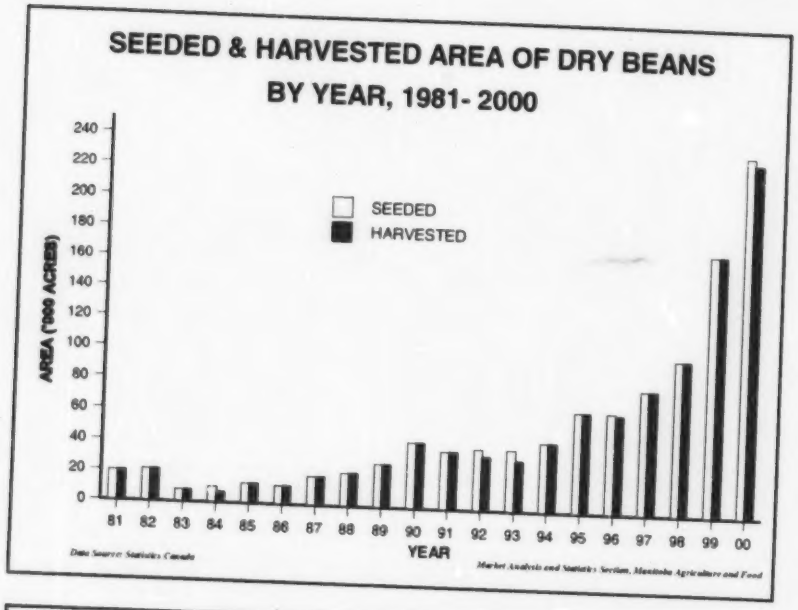
DRY BEANS AND DRY BEAN PRODUCTS SECTOR

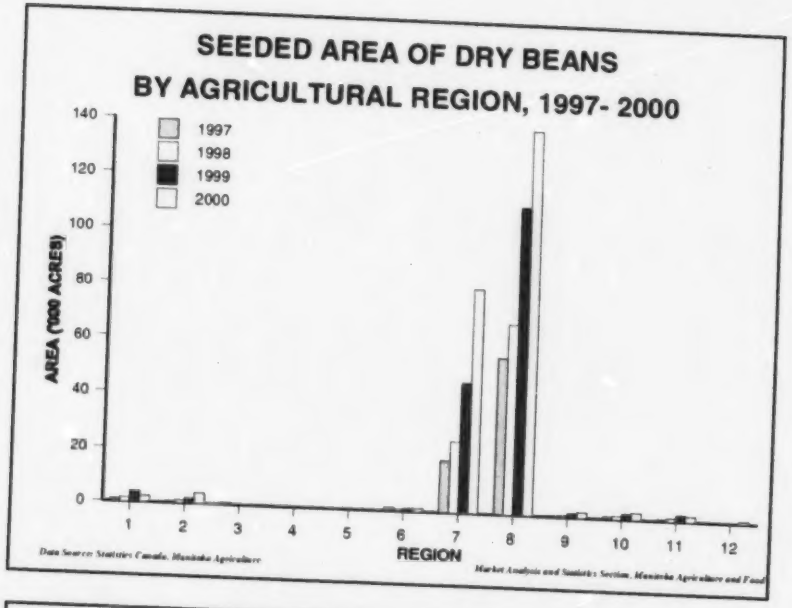
	1997	1998	1999	2000[P]	'00 as a % of '99
Estimated Number of Farms	400	500	850	1,000	118
CROP PRODUCTION:					
Seeded Area ('000 acres):					
All beans	80	100	170	235	138
% of Canada	36.8	43.1	45.9	57.7	
White beans/Navy beans	50	50	100	125	125
Coloured beans	30	50	70	110	157
Harvested Area ('000 acres):	80	100	170	230	135
White beans/Navy beans	50	50	100	120	120
Coloured beans	30	50	70	110	157
Yield/acre (pounds):	1,315	1,590	1,580	1,410	89
White Pea beans/Navy beans	1,400	1,600	1,600	1,380	86
Coloured beans	1,167	1,580	1,540	1,450	94
Production (million pounds):					
All beans	105.0	159	268	325	121
% of Canada	29.7	39.0	42.7	56.3	
White Pea beans/Navy beans	70.1	80	160	165	103
Coloured beans	35.2	79	108	160	148
Average Price ($/pound):	0.250	0.231	0.213	0.188	88
VALUE OF PRODUCTION ($ million):	26.3	36.8	57.2	61.2	107
ESTIMATED TOTAL EXPENSES ($/acre):	285.63	311.10	299.38	288.53	96
CASH RECEIPTS ($ million):	18.8	40.0	50.2	62.3	124
% of Canada	27.8	44.9	40.6	52.5	
EXPORTS ($ million):	14.8	25.7	54.5	48.9	90
Dry, shelled beans	14.8	25.7	54.5	48.9	90
IMPORTS ($ million):	1.7	4.1	11.9	3.3	28
Dry, shelled beans	1.7	4.1	11.9	3.3	28

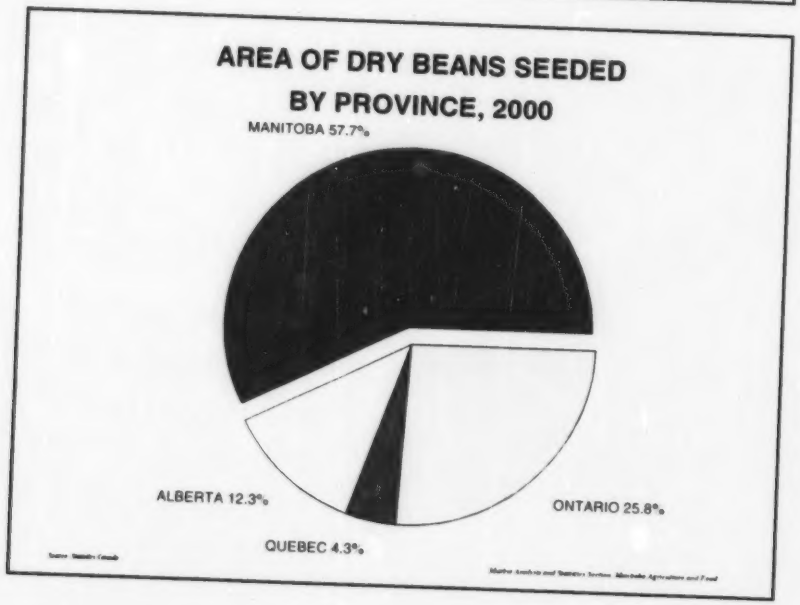
DRY BEAN INDUSTRY CHART, 2000

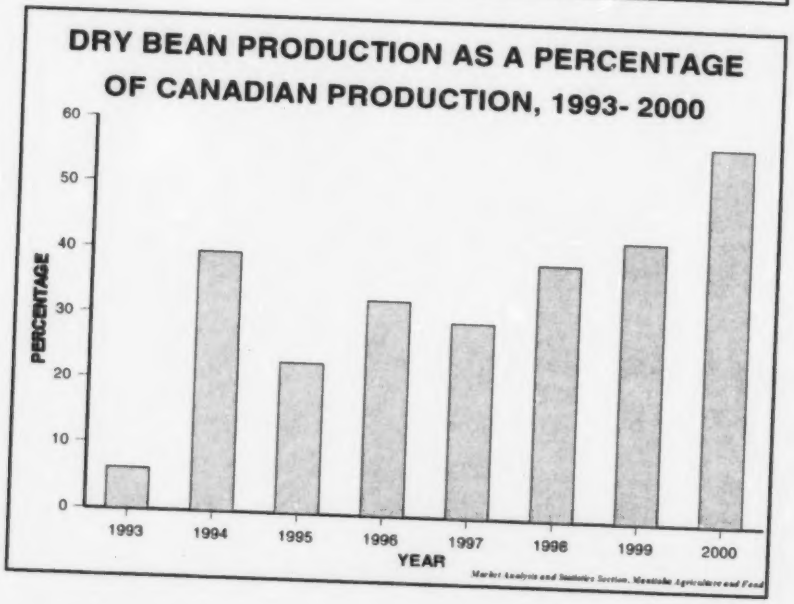


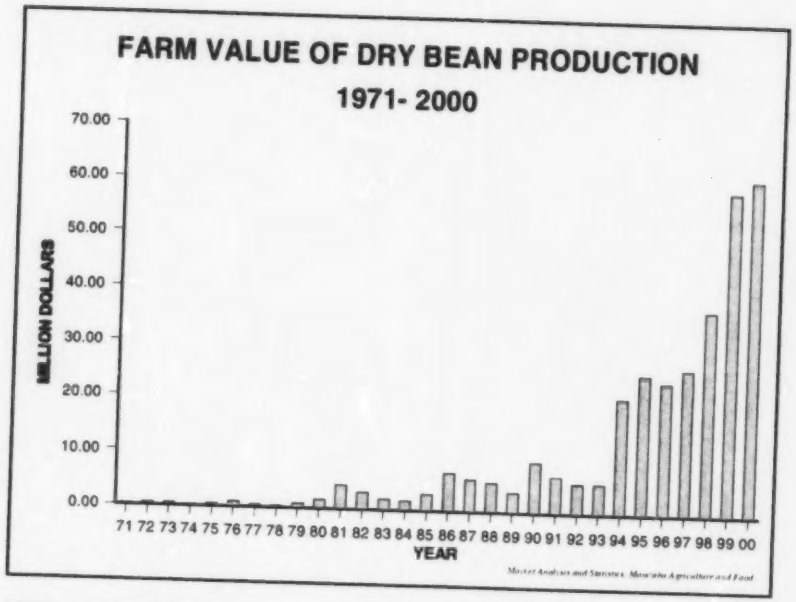
DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

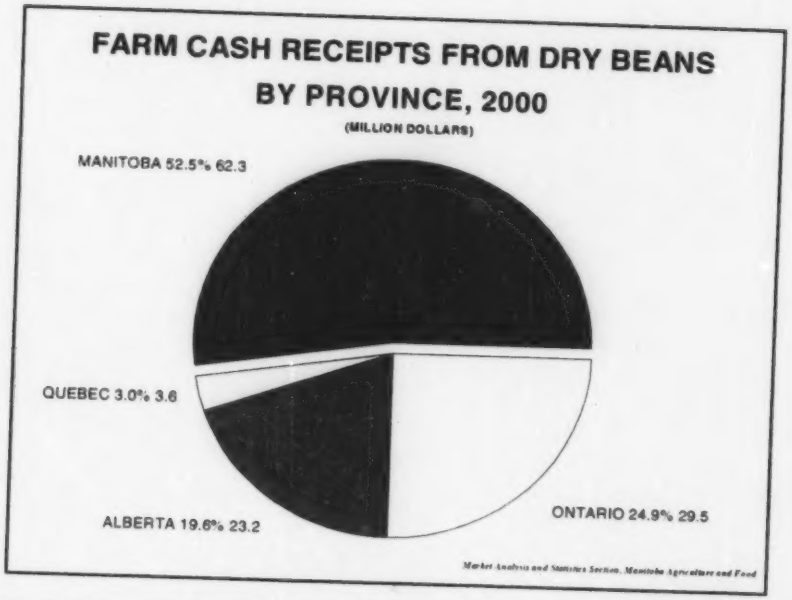

SEEDED & HARVESTED AREA OF DRY BEANS
BY YEAR, 1981- 2000
AREA ('000 ACRES)
240
220
200
180
160
140
120
100
80
60
40
20
0
SEEDED
HARVESTED
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR

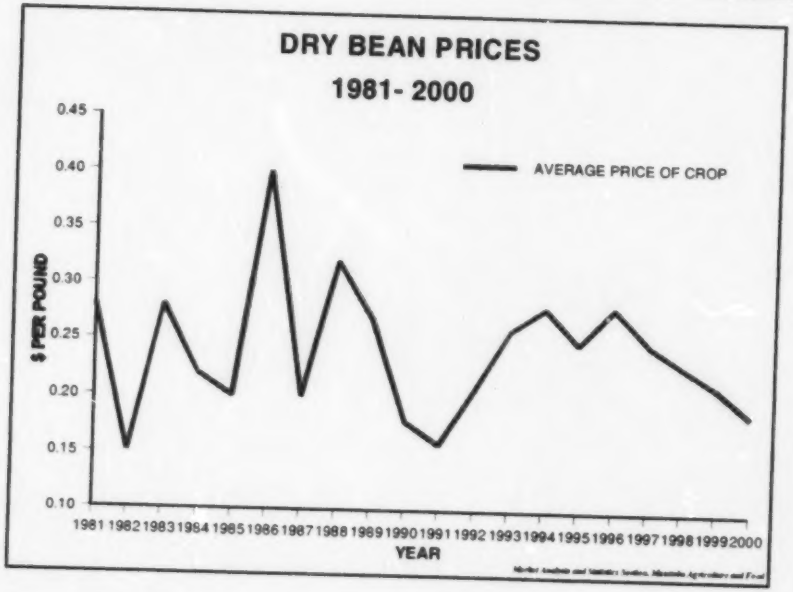

SEEDED AREA OF DRY BEANS
BY AGRICULTURAL REGION, 1997- 2000
AREA ('000 ACRES)
140
120
100
80
60
40
20
0
1997
1998
1999
2000
1 2 3 4 5 6 7 8 9 10 11 12
REGION

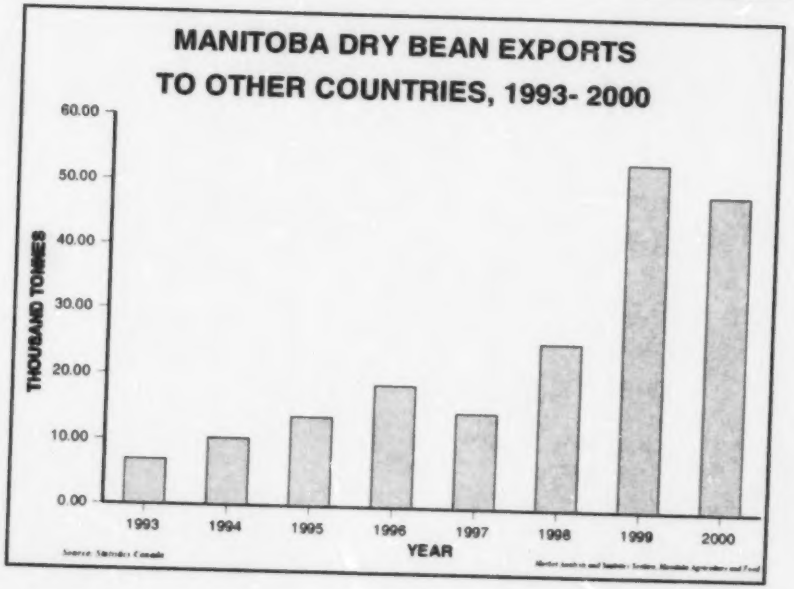

AREA OF DRY BEANS SEEDED
BY PROVINCE, 2000
MANITOBA 57.7%
ALBERTA 12.3%
ONTARIO 25.8%
QUEBEC 4.3%

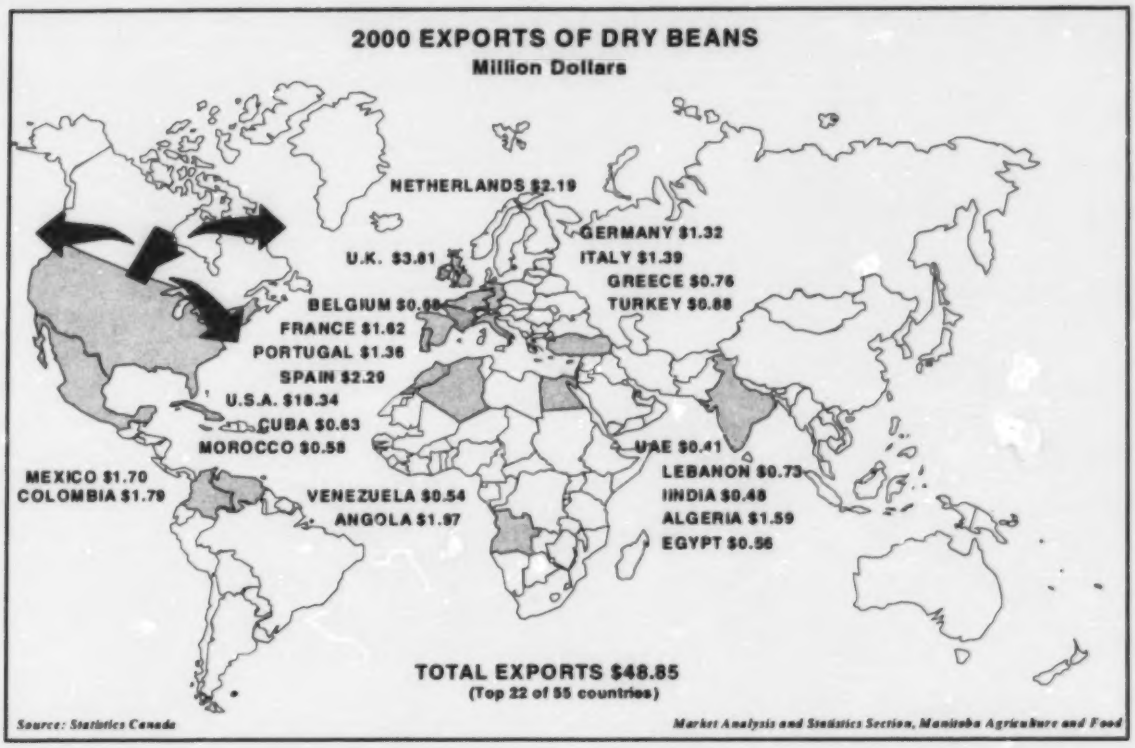

DRY BEAN PRODUCTION AS A PERCENTAGE
OF CANADIAN PRODUCTION, 1993- 2000
PERCENTAGE
60
50
40
30
20
10
0
1993 1994 1995 1996 1997 1998 1999 2000
YEAR

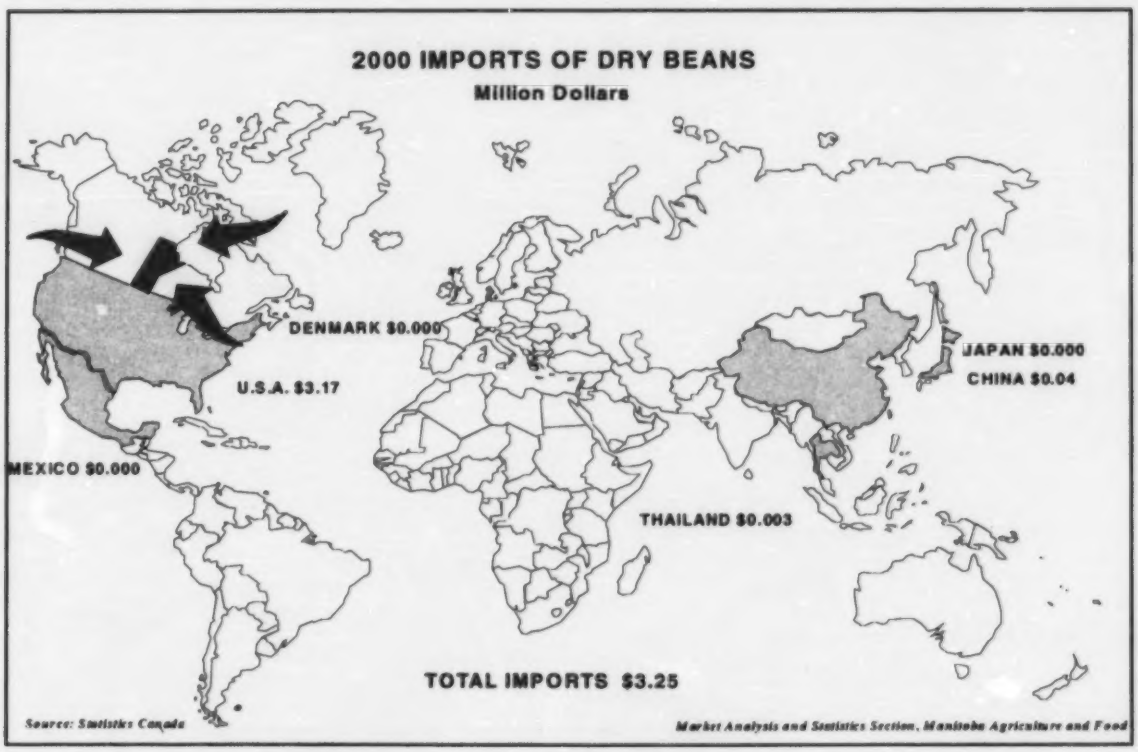

FARM VALUE OF DRY BEAN PRODUCTION
1971- 2000
MILLION DOLLARS
70.00
60.00
50.00
40.00
30.00
20.00
10.00
0.00
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR


FARM CASH RECEIPTS FROM DRY BEANS
BY PROVINCE, 2000
(MILLION DOLLARS)
MANITOBA 52.5% 62.3
QUEBEC 3.0% 3.6
ALBERTA 19.6% 23.2
ONTARIO 24.9% 29.5


DRY BEAN PRICES
1981- 2000
AVERAGE PRICE OF CROP
$ PER POUND
0.45
0.40
0.35
0.30
0.25
0.20
0.15
0.10
1981 1982 1983 1984 1985 1986 1987 1988 1989 1990 1991 1992 1993 1994 1995 1996 1997 1998 1999 2000
YEAR


MANITOBA DRY BEAN EXPORTS
TO OTHER COUNTRIES, 1993- 2000
THOUSAND TONNES
60.00
50.00
40.00
30.00
20.00
10.00
0.00
1993
1994
1995
1996
1997
1998
1999
2000
YEAR


2000 EXPORTS OF DRY BEANS
Million Dollars
NETHERLANDS $2.19
GERMANY $1.32
U.K. $3.81
ITALY $1.39
GREECE $0.76
TURKEY $0.88
BELGIUM $0.68
FRANCE $1.62
PORTUGAL $1.36
SPAIN $2.29
U.S.A. $18.34
CUBA $0.83
MOROCCO $0.58
UAE $0.41
LEBANON $0.73
MEXICO $1.70
COLOMBIA $1.79
VENEZUELA $0.54
ANGOLA $1.97
INDIA $0.48
ALGERIA $1.59
EGYPT $0.56
TOTAL EXPORTS $48.85
(Top 22 of 55 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2000 IMPORTS OF DRY BEANS
Million Dollars
DENMARK $0.000
JAPAN $0.000
CHINA $0.04
U.S.A. $3.17
MEXICO $0.000
THAILAND $0.003
TOTAL IMPORTS $3.25
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

DRY PEA SECTOR

DRY PEA SECTOR PROFILE

Production:

Although Manitoba producers grew dry peas between 1908 and 1912, the seeded area was less than 2,000 acres. There was little to no dry pea production during the First World War, but production started again in 1919. Over the past 80 years, the area seeded to peas varied from as low as 500 acres in 1931 to as high as 260,000 acres in 1998.

Harvested area and production of the crop were record high in 1998 with 255,000 acres and 8.3 million bushels respectively, but were at 150,000 acres and 5.9 million bushels in 2000. About 85 percent of Manitoba's 2000 pea plantings were yellow pea varieties, about 15 percent were green varieties with the balance sown to other feed types. Dry pea yields were record high at 39.3 bushels per acre in 2000. The 10-year average yield was 31.5 bushels per acre.

Manitoba produced 5.6 percent of the Western Canadian dry pea crop in 2000, down from 21.6 percent in 1992. There are agronomic benefits to dry pea production. Up until 1998, net returns were at least comparable to wheat production. While the focus in earlier years was on food-quality peas, now much of the crop is used for feed. Peas are not grown in Eastern Canada.

Average dry pea prices have ranged between $3.67 and $6.80 per bushel since 1973. The average price of $3.67 per bushel for the 1999 and 2000 crops was down by 8 percent from 1998. The value of dry pea production fell from $33.2 million in 1998 to $12.4 million in 1999 due to lower production and prices. Unprofitable prices had discouraged many producers from growing peas. The larger pea crop in 2000 led to a 75 percent rise in production value to $21.7 million.

Marketing:

Annual cash receipts for the sector increased from $12.2 million in 1993 to $27.7 million in 1998, but fell to $14.9 million in 2000. Manitoba's contribution to Canadian dry pea receipts fell from 23.3 percent in 1992 to 5.5 percent in 2000. Manitoba markets primarily yellow peas for food and livestock feed along with smaller amounts of green peas.

Processing:

Peas are cleaned, split and bagged by companies such as AgPro/Saskatchewan Wheat Pool, Agricore, Agricore East, Agri-Tel Grain Ltd., Cargill Ltd., Conagra Grain Canada, Finora Canada Ltd., Horizon Agro, Louis Dreyfus Canada Ltd., Northern Sales Ltd., Parent Seeds Ltd., Parrheim Foods, Parrish & Heimbecker, James Richardson International, Prairieland Grain, Prairie Mountain Agri, Roy Legumex Inc., S.S. Johnson Seeds, Tri-Lake Agri, United Grain Growers, and XCAN Grain Ltd. The main processor of Manitoba peas was Woodstone Foods Corp., which produced whole peas, split peas, pea flour, protein, starch and fibre as well as fat replacers. The company closed at the end of 1996, but reopened in the spring of 1997 under Parrish and Heimbecker. The P. & H. plant in Saskatoon supplies 500 tonnes per year of pea starch and protein for further refining at the Manitoba plant. Best Cooking Pulses, Inc. in Portage la Prairie produce fine and coarse pea hull fibre, while Glenlochar Kitchens in Miniota and Eidse Family Farms in Morris produce consumer packages of soup mixes, which include peas. Peas are used in hog rations as an alternative protein source to soy and canola meal.

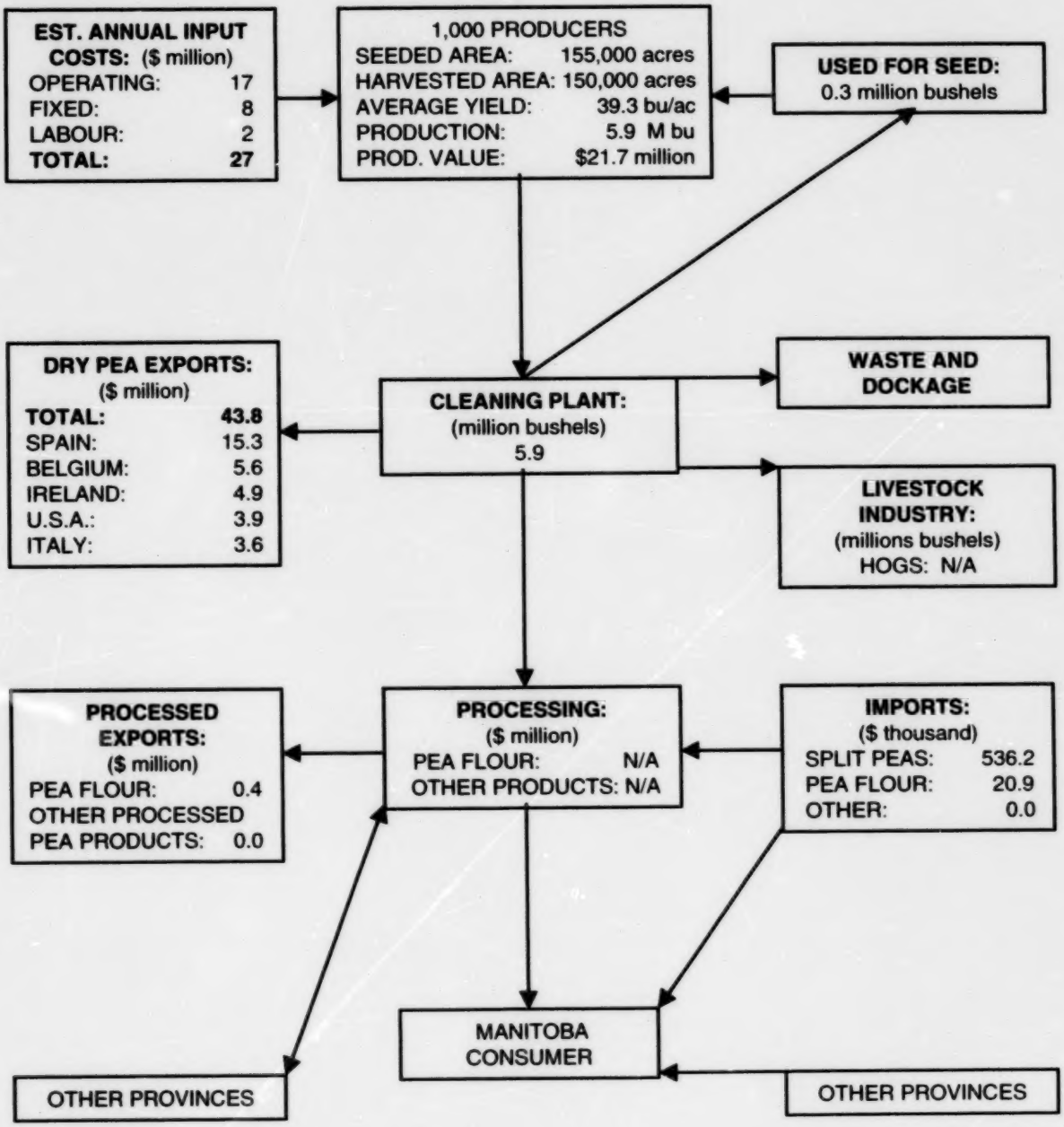
Trade:

Some of Manitoba's food-quality peas may be shipped to canneries in Eastern Canada, but most of the food pea exports are shipped to countries such as Spain, Belgium, Ireland, the United States and Italy. Dry pea exports amounted to $43.8 million in 2000. Small amounts of pea flour are exported to countries such as the Netherlands, USA, the United Kingdom and Germany. Manitoba imported about $536,200 of split peas in 2000, mostly from the USA.

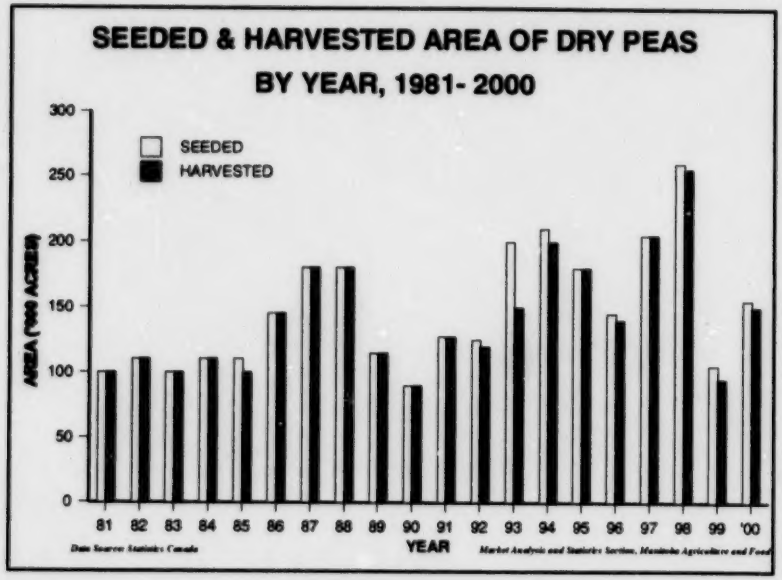
DRY PEAS AND DRY PEA PRODUCTS SECTOR

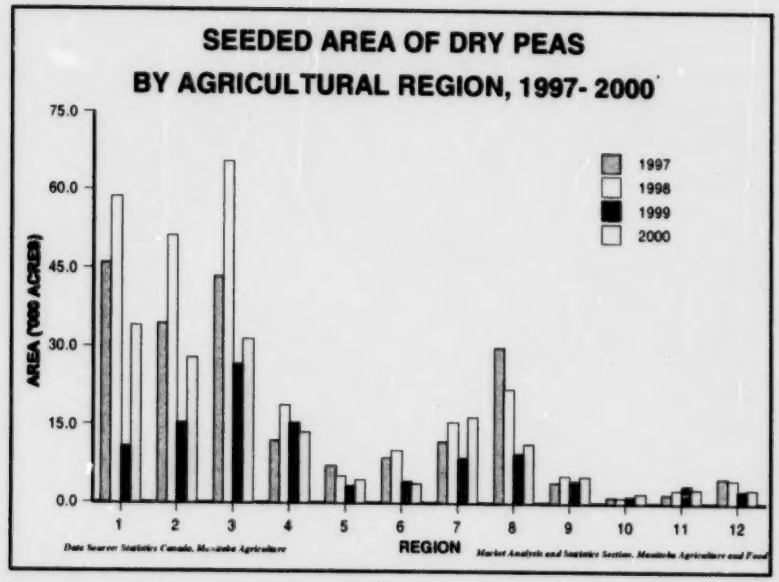
	1997	1998	1999	2000[P]	'00 as a % of '99
Estimated Number of Farms	1,000	1,200	900	1,000	111
CROP PRODUCTION:					
Seeded Area ('000 acres):	205	260	105	155	148
% of Canada	9.8	9.7	5.0	5.1	
Harvested Area ('000 acres):	205	255	95	150	158
Yield/acre (bushels)	32.0	32.5	35.6	39.3	108
Production (million bu):	6.6	8.3	3.4	5.9	174
% of Canada	10.1	9.7	4.1	5.6	
Average Price ($/bu):	4.81	4.00	3.67	3.67	100
VALUE OF PRODUCTION ($ million):	31.5	33.2	12.4	21.7	175
ESTIMATED TOTAL EXPENSES ($/acre):	196.70	211.80	195.42	177.82	91
CASH RECEIPTS ($ million):	25.7	27.7	16.2	14.9	92
% of Canada	10.8	10.1	6.2	5.5	
CROP DISPOSITION (million bu):	6.7	8.5	3.8	6.1	161
Marketings	5.1	6.2	2.7	4.8	178
Seed Requirements	0.5	0.2	0.3	0.3	100
Feed, Waste & Dockage	0.9	1.7	0.5	0.8	160
Carryover, July 31	0.2	0.4	0.2	0.3	150
EXPORTS ($ million):	75.8	47.5	36.9	44.2	120
Dry, shelled peas	75.7	47.3	36.7	43.8	119
Pea meal, flour, etc.	0.07	0.2	0.2	0.4	200
IMPORTS ($ thousand):	479.8	624.5	600.3	557.1	93
Dry, shelled peas	479.8	624.4	588.1	536.2	91
Pea meal, flour, etc.	0.0	0.0	13.0	20.9	161

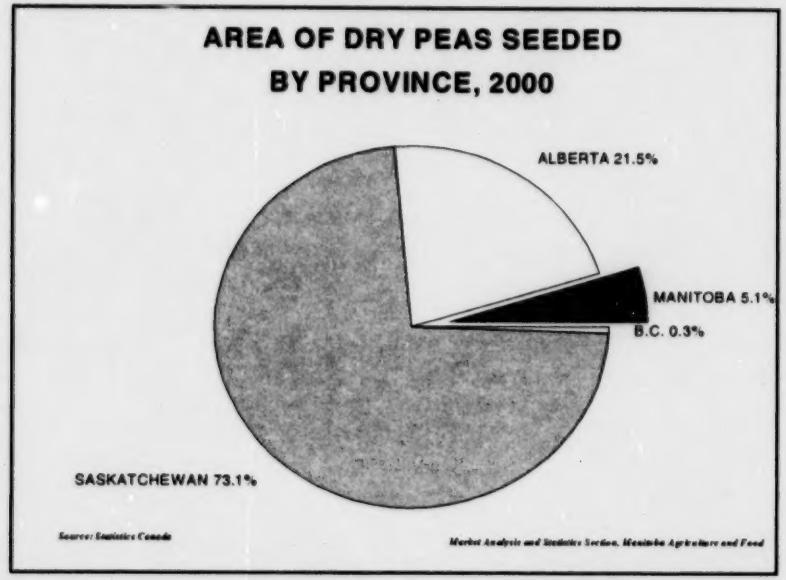
DRY PEA INDUSTRY CHART, 2000

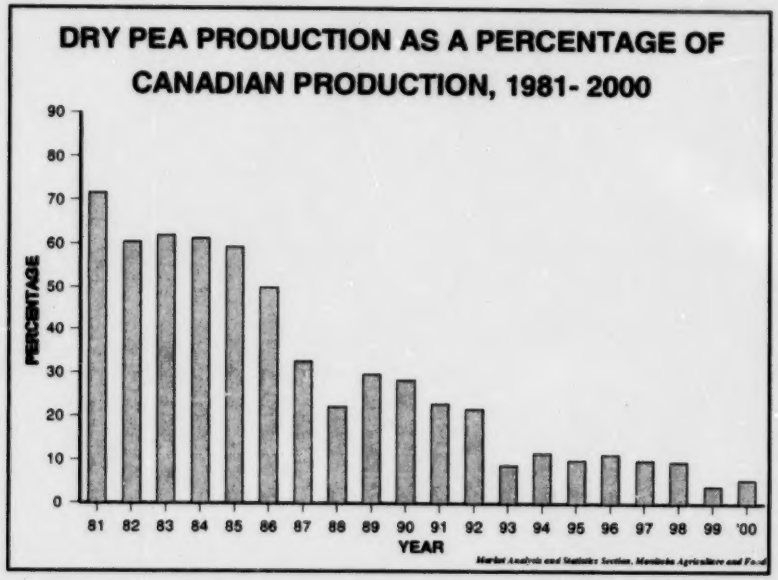


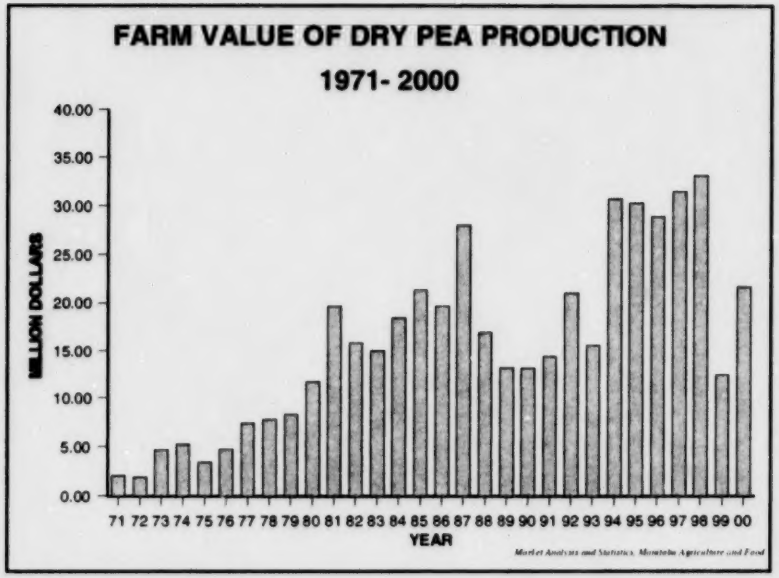
DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

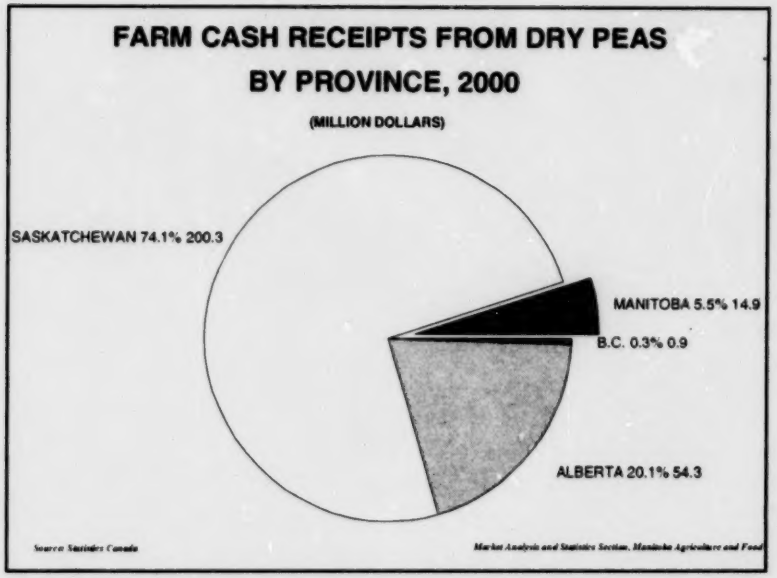

SEEDED & HARVESTED AREA OF DRY PEAS
BY YEAR, 1981- 2000
SEEDED
HARVESTED
AREA ('000 ACRES)
300
250
200
150
100
50
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00
YEAR
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

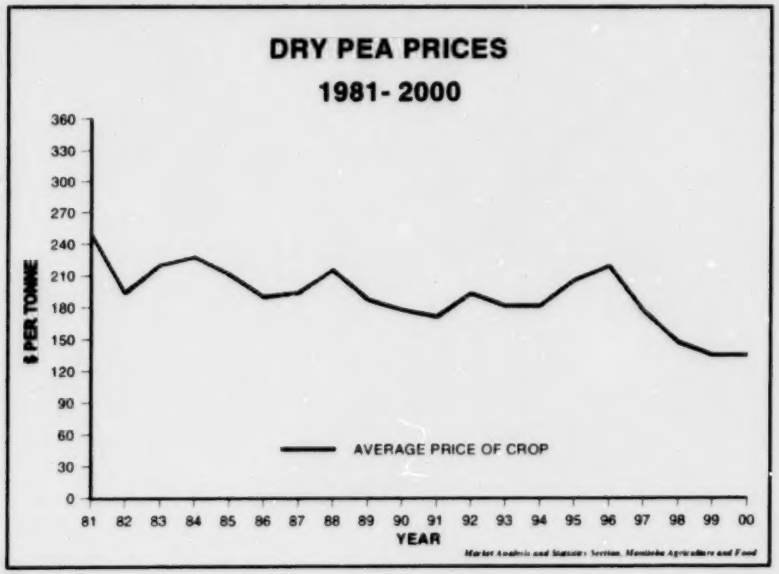

SEEDED AREA OF DRY PEAS
BY AGRICULTURAL REGION, 1997- 2000
1997
1998
1999
2000
AREA ('000 ACRES)
75.0
60.0
45.0
30.0
15.0
0.0
1 2 3 4 5 6 7 8 9 10 11 12
REGION
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food

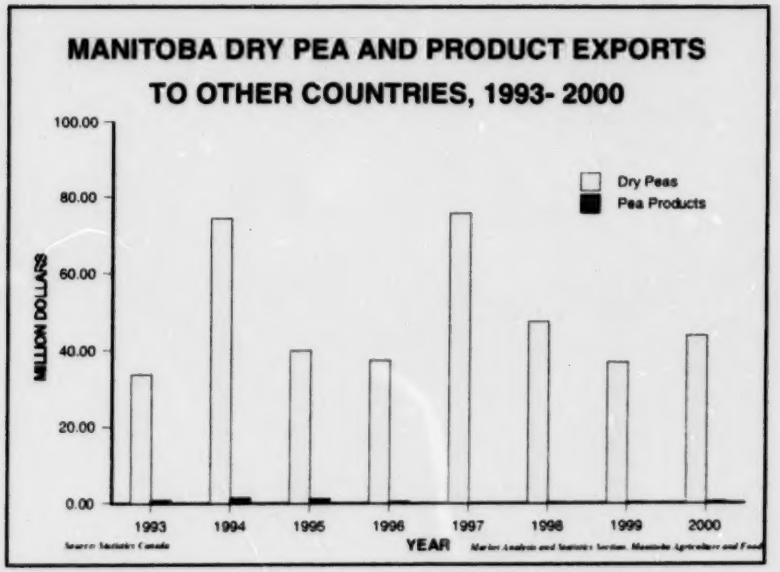

AREA OF DRY PEAS SEEDED
BY PROVINCE, 2000
ALBERTA 21.5%
MANITOBA 5.1%
B.C. 0.3%
SASKATCHEWAN 73.1%
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

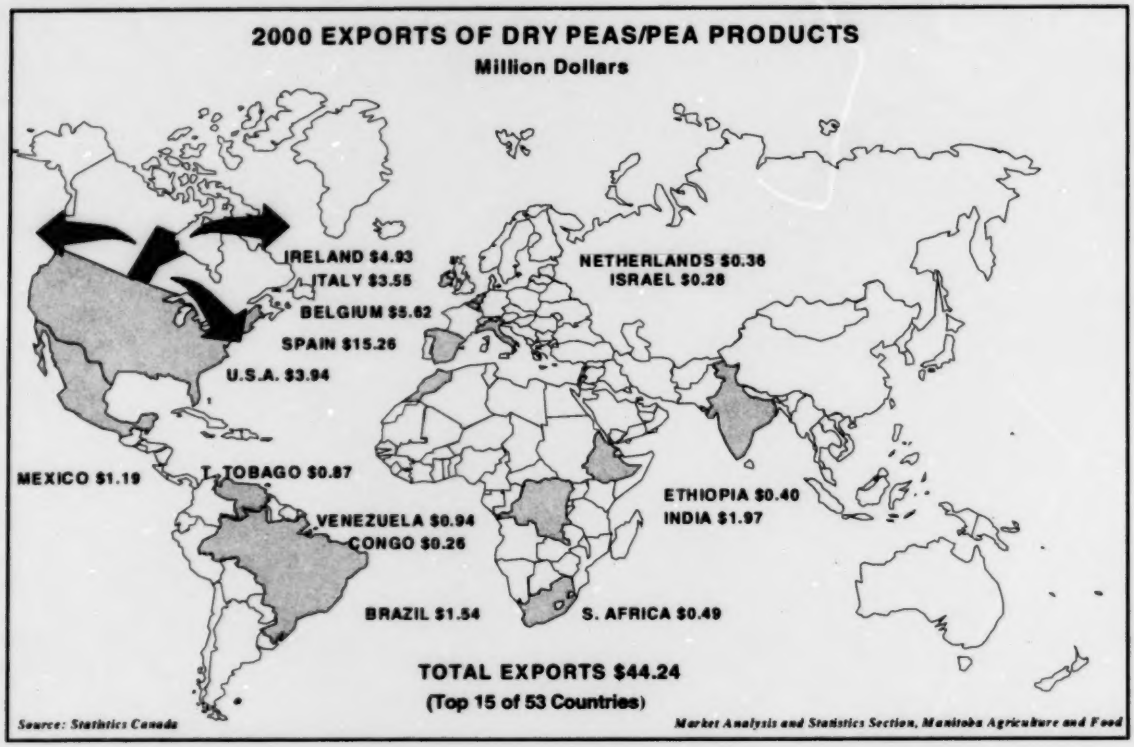

DRY PEA PRODUCTION AS A PERCENTAGE OF
CANADIAN PRODUCTION, 1981- 2000
PERCENTAGE
90
80
70
60
50
40
30
20
10
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food

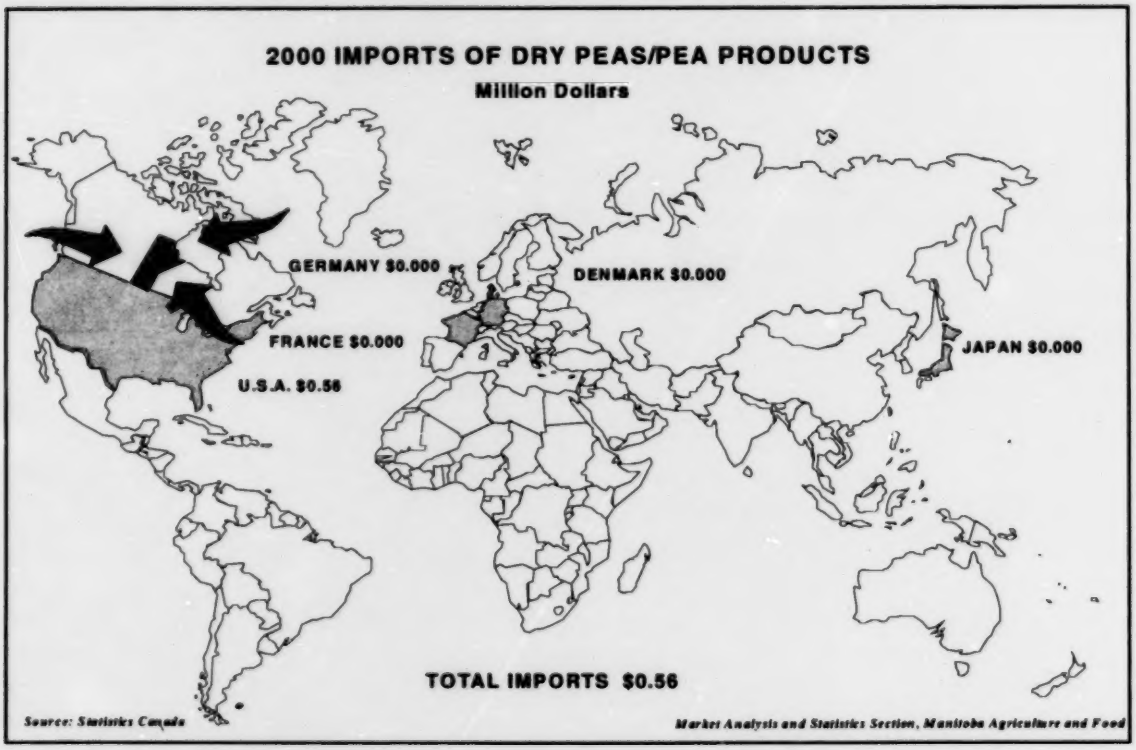

FARM VALUE OF DRY PEA PRODUCTION
1971- 2000
MILLION DOLLARS
40.00
35.00
30.00
25.00
20.00
15.00
10.00
5.00
0.00
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR


FARM CASH RECEIPTS FROM DRY PEAS
BY PROVINCE, 2000
(MILLION DOLLARS)
SASKATCHEWAN 74.1% 200.3
MANITOBA 5.5% 14.9
B.C. 0.3% 0.9
ALBERTA 20.1% 54.3

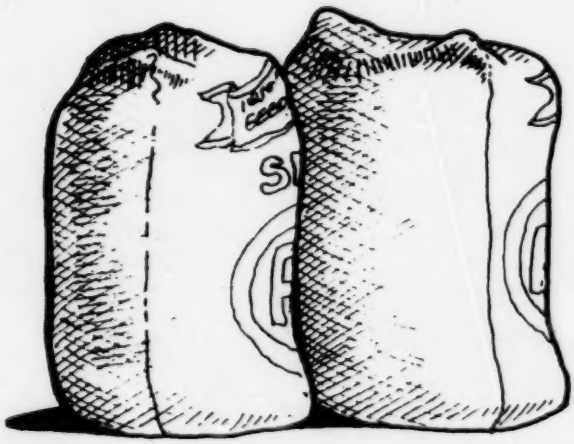

DRY PEA PRICES
1981- 2000
$ PER TONNE
360
330
300
270
240
210
180
150
120
90
60
30
0
AVERAGE PRICE OF CROP
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR


MANITOBA DRY PEA AND PRODUCT EXPORTS
TO OTHER COUNTRIES, 1993- 2000
MILLION DOLLARS
100.00
80.00
60.00
40.00
20.00
0.00
Dry Peas
Pea Products
1993
1994
1995
1996
1997
1998
1999
2000
YEAR


2000 EXPORTS OF DRY PEAS/PEA PRODUCTS
Million Dollars
IRELAND $4.93
ITALY $3.55
BELGIUM $5.62
SPAIN $15.26
U.S.A. $3.94
NETHERLANDS $0.36
ISRAEL $0.28
MEXICO $1.19
TOBAGO $0.87
VENEZUELA $0.94
CONGO $0.26
BRAZIL $1.54
S. AFRICA $0.49
ETHIOPIA $0.40
INDIA $1.97
TOTAL EXPORTS $44.24
(Top 15 of 53 Countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2000 IMPORTS OF DRY PEAS/PEA PRODUCTS
Million Dollars
GERMANY $0.000
FRANCE $0.000
U.S.A. $0.56
DENMARK $0.000
JAPAN $0.000
TOTAL IMPORTS $0.56
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

LENTIL SECTOR



LENTIL SECTOR PROFILE

Production:

Commercial production of lentils began in the early 1970s in Manitoba with 2,500 acres seeded and harvested in 1972. By 1979, the seeded area had increased to 17,100 acres with further significant increases occurring in the 1990s. As a legume, lentils are important in crop rotation. A record 155,000 acres of lentils were seeded and harvested in 1992 and produced 175 million pounds of lentils. Uncompetitive prices led to reduced interest in lentil production and the seeded area fell to 8,000 acres in 1997. Prices improved in 1999, which led to 35,000 acres of lentils being seeded in 2000. About 98 percent of Manitoba's lentil plantings were to the small lentils (Eston) with yellow cotyledon (colour showing when split in half) with the remaining 2 percent seeded to the larger yellow type (Laird) lentils.

Average lentil yields were record high at 1,527 pounds per acre in 1990, but fell to a 12-year low of 665 pounds per acre in 1993. Yields rose to 1,290 pounds per acre in 1999, but declined to 1,076 pounds per acre in 2000. This was 2.7 percent below the 10-year average of 1,106 pounds per acre. Lentil production, at 35.5 million pounds in 2000, was almost double the level of a year earlier.

Manitoba produced about 1.8 percent of the Canadian lentil crop in 2000, well below 22.7 percent in 1992. All commercial lentil production takes place on the Prairies with over 96 percent in Saskatchewan. There are almost no lentils produced in Eastern Canada.

Over the last twenty-seven years, average lentil prices have ranged between $0.13 and $0.35 per pound. The average price of $0.15 per pound for the 2000 crop was down by 19 percent from the previous year. Farm value of the crop peaked in 1992 at $23.4 million. The value of the 2000 crop was $5.3 million, up from $3.6 million in 1999.

Marketing:

Annual farm cash receipts for the sector rose from $10.0 million in 1994 to $12.4 million in 1995, but were $3.9 million in 2000. Manitoba's contribution to Canadian lentil receipts decreased from 10.0 percent in 1994 to 1.6 percent in 2000.

Lentils are a protein-rich food for human consumption, but downgraded product could be used for livestock feed.

Processing:

Cleaning and bagging of lentils are done by companies such as AgPro/Saskatchewan Wheat Pool, Agricore East, Berdex Canada Ltd., Finora Canada Ltd., Horizon Agro, Northern Sales Ltd., Parent Seeds Ltd., Prairieland Grain, Roy Legumex Inc., S.S. Johnson Seeds, and XCAN Grain Ltd. There is little further processing of lentils, but companies such as Glenlochar Kitchens in Miniota and Eidse Family Farms in Morris mix lentils with other legumes and rice for sale as soup and stew bases.

Trade:

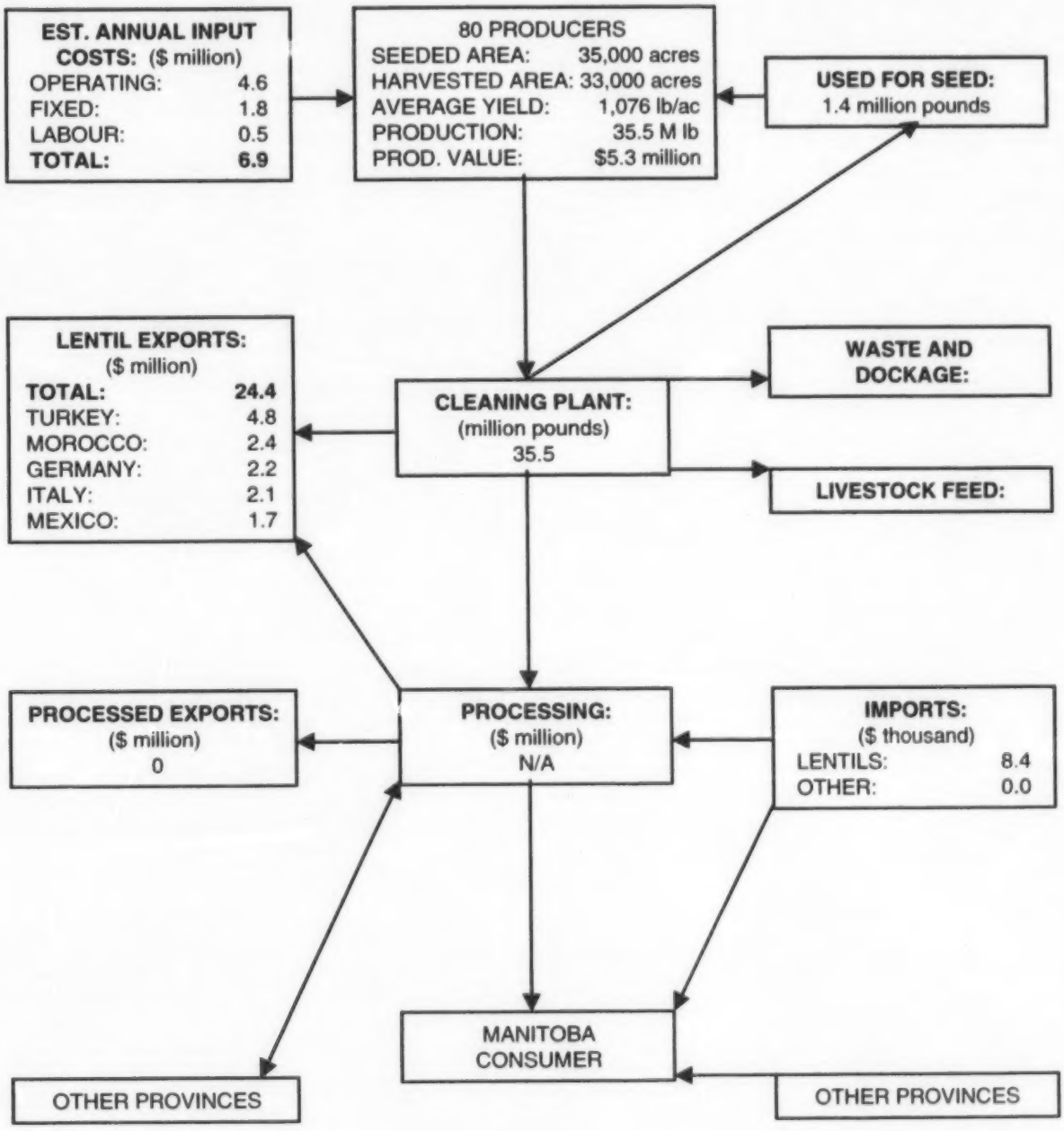
Some of Manitoba's lentils may be shipped to Eastern Canada, but $24.4 million of the lentils sold out of province in 2000 were exported to 44 countries including Turkey, Morocco, Germany, Italy and Mexico.

Manitoba imported about $8,400 of lentils from the United States in 2000.

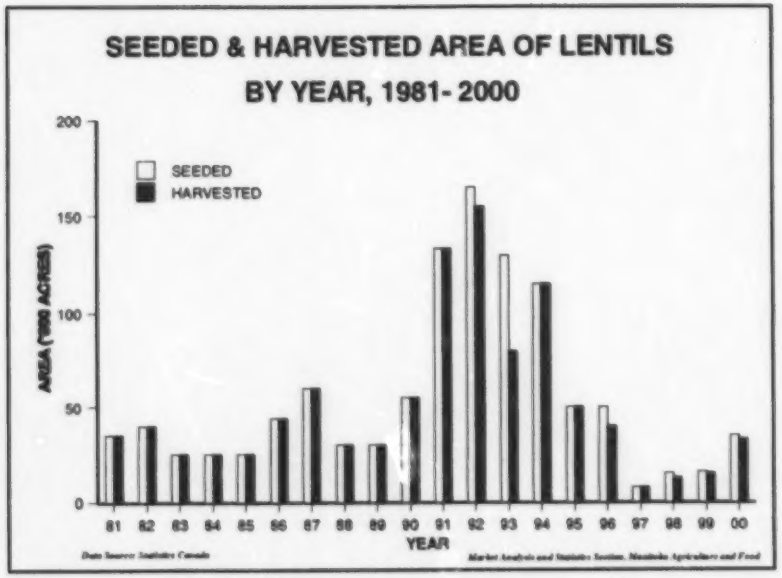
LENTIL SECTOR

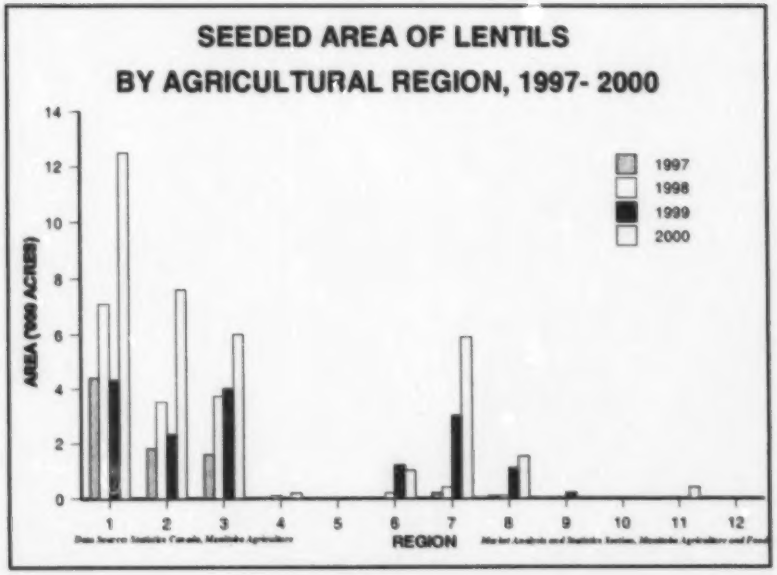
	1997	1998	1999	2000[P]	'00 as a % of '99
Estimated Number of Farms	20	40	40	80	200
CROP PRODUCTION:					
Seeded Area ('000 acres):	8	15	16	35	217
% of Canada	1.0	1.6	1.3	2.0	
Harvested Area ('000 acres):	8	13	15	33	218
Yield/acre (pounds):	1,450	992	1,292	1,076	86
Production (million pounds):	11.7	13.0	19.4	35.5	183
% of Canada	1.4	1.2	1.2	1.8	
Average Price ($/pound):	0.133	0.145	0.186	0.150	81
VALUE OF PRODUCTION ($ million):	1.5	1.9	3.6	5.3	147
ESTIMATED TOTAL EXPENSES ($/acre):	164.06	178.69	171.96	198.25	115
CASH RECEIPTS ($ million):	4.0	2.4	2.7	3.9	144
% of Canada	4.1	2.0	1.4	1.6	
EXPORTS ($ million):	21.6	20.6	25.0	24.4	98
Shelled lentils	21.6	20.6	25.0	24.4	98
IMPORTS ($ thousand):	73.6	123.6	133.4	8.4	6
Shelled lentils	73.6	123.6	133.4	8.4	6

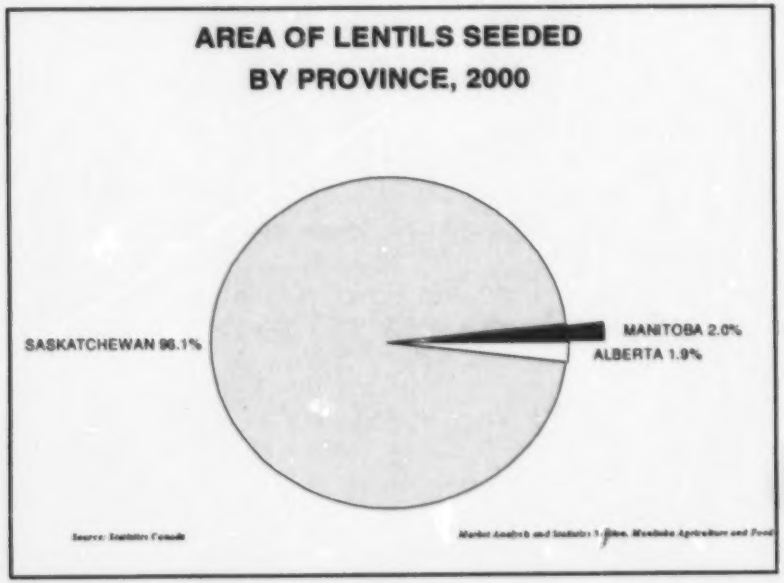
LENTIL INDUSTRY CHART, 2000

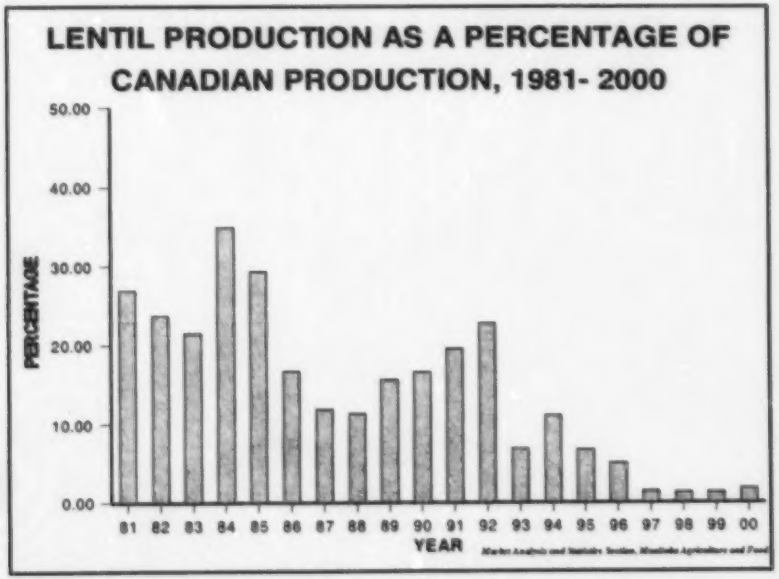


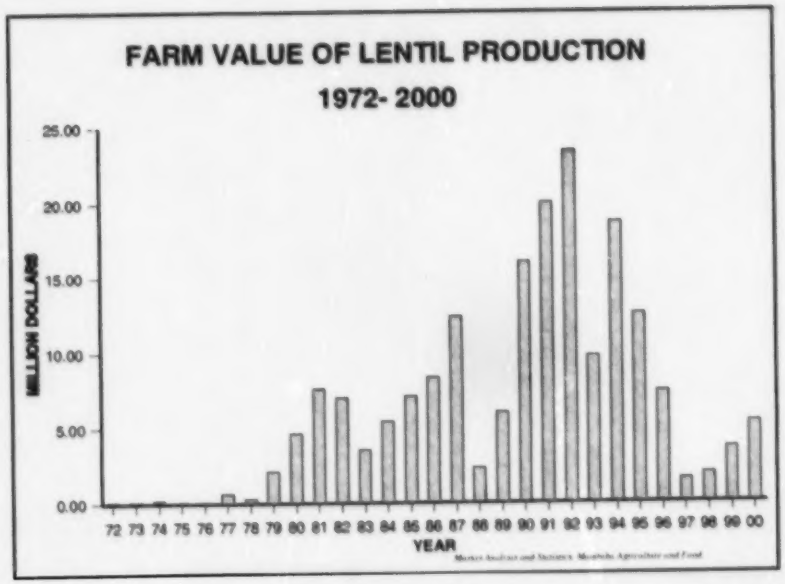
DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

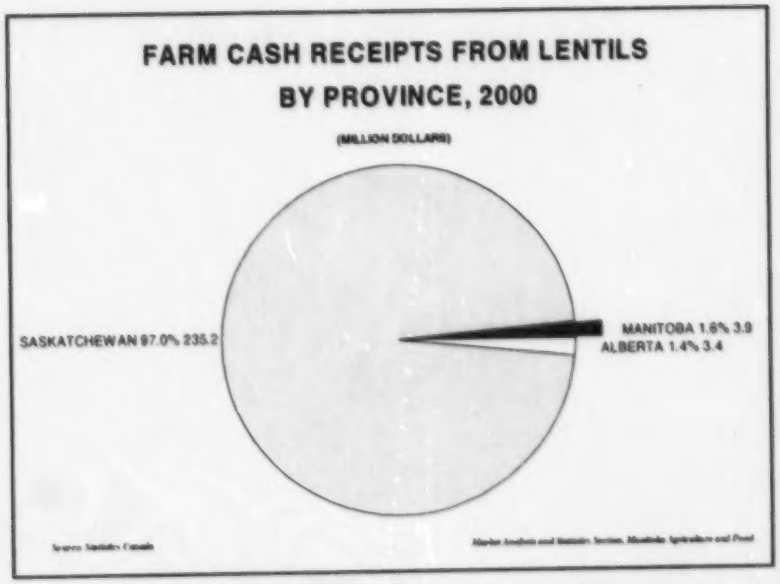

SEEDED & HARVESTED AREA OF LENTILS
BY YEAR, 1981- 2000
SEEDED
HARVESTED
AREA ('000 ACRES)
200
150
100
50
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR

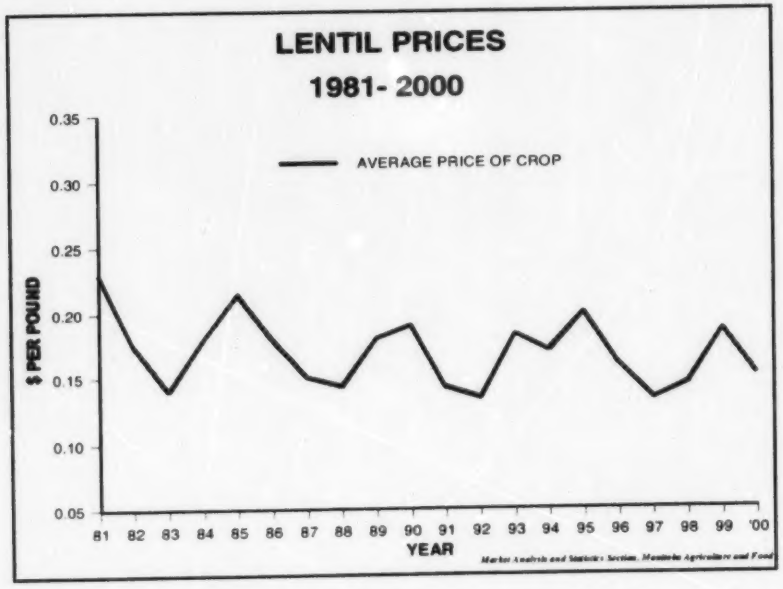

SEEDED AREA OF LENTILS
BY AGRICULTURAL REGION, 1997- 2000
1997
1998
1999
2000
AREA ('000 ACRES)
14
12
10
8
6
4
2
0
1 2 3 4 5 6 7 8 9 10 11 12
REGION

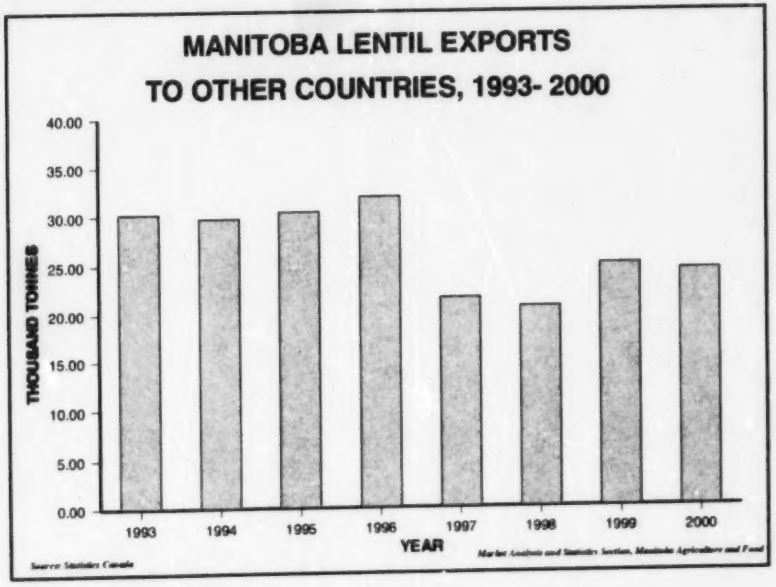

AREA OF LENTILS SEEDED
BY PROVINCE, 2000
SASKATCHEWAN 96.1%
MANITOBA 2.0%
ALBERTA 1.9%

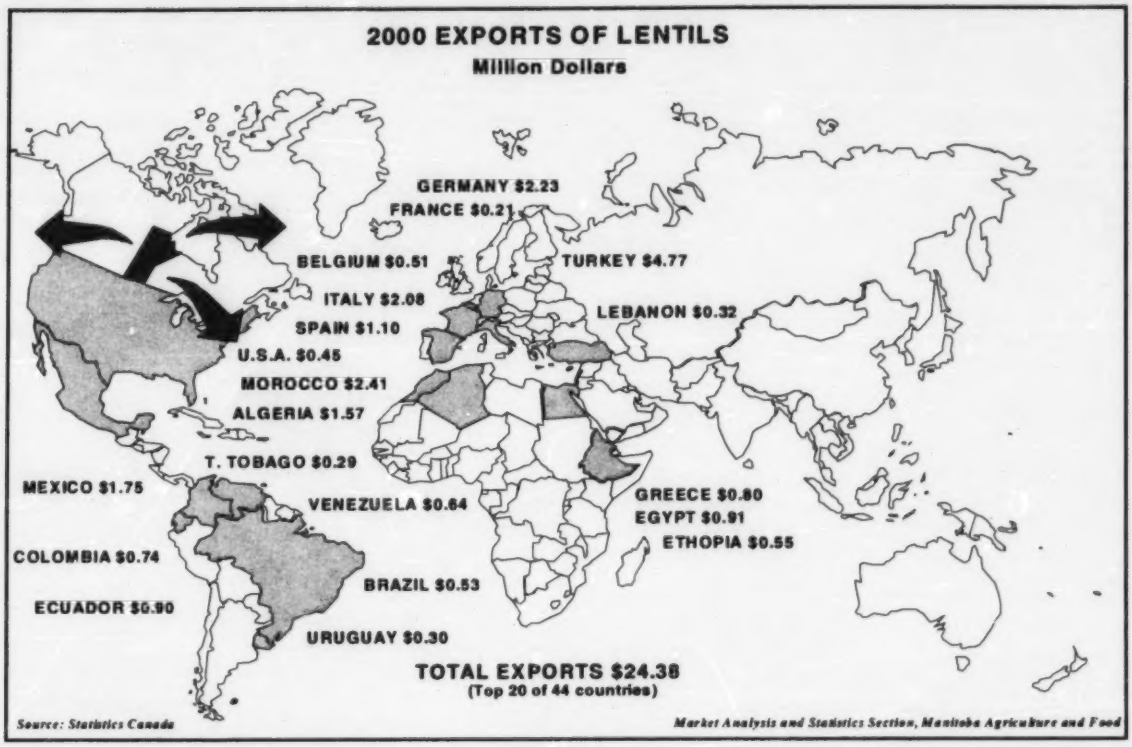

LENTIL PRODUCTION AS A PERCENTAGE OF
CANADIAN PRODUCTION, 1981- 2000
PERCENTAGE
50.00
40.00
30.00
20.00
10.00
0.00
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR

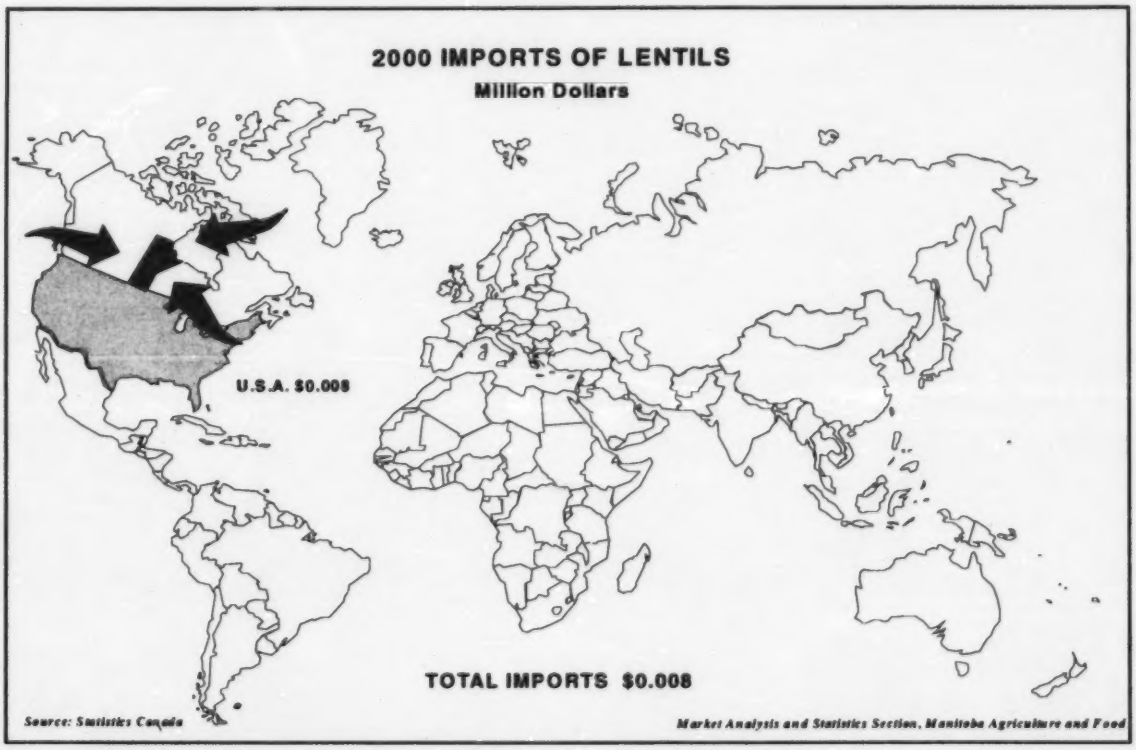

FARM VALUE OF LENTIL PRODUCTION
1972- 2000
MILLION DOLLARS
25.00
20.00
15.00
10.00
5.00
0.00
72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR


FARM CASH RECEIPTS FROM LENTILS
BY PROVINCE, 2000
(MILLION DOLLARS)
SASKATCHEWAN 97.0% 235.2
MANITOBA 1.6% 3.9
ALBERTA 1.4% 3.4


LENTIL PRICES
1981- 2000
AVERAGE PRICE OF CROP
$ PER POUND
0.35
0.30
0.25
0.20
0.15
0.10
0.05
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00
YEAR


MANITOBA LENTIL EXPORTS
TO OTHER COUNTRIES, 1993- 2000
THOUSAND TONNES
40.00
35.00
30.00
25.00
20.00
15.00
10.00
5.00
0.00
1993 1994 1995 1996 1997 1998 1999 2000
YEAR


2000 EXPORTS OF LENTILS
Million Dollars
GERMANY $2.23
FRANCE $0.21
BELGIUM $0.51
TURKEY $4.77
ITALY $2.08
LEBANON $0.32
SPAIN $1.10
U.S.A. $0.45
MOROCCO $2.41
ALGERIA $1.57
T. TOBAGO $0.29
MEXICO $1.75
VENEZUELA $0.64
GREECE $0.80
EGYPT $0.91
ETHIOPIA $0.55
COLOMBIA $0.74
BRAZIL $0.53
ECUADOR $0.90
URUGUAY $0.30
TOTAL EXPORTS $24.38
(Top 20 of 44 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2000 IMPORTS OF LENTILS
Million Dollars
U.S.A. $0.008
TOTAL IMPORTS $0.008
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

MUSTARD SEED SECTOR

MUSTARD SEED SECTOR PROFILE

Production:

Mustard seed production began in Manitoba in 1952 with 1,300 acres planted. The dry conditions of the Prairies are well suited to mustard seed production and much of the world's crop comes from Western Canada, particularly Saskatchewan. Although Manitoba grows only 1-2 percent of the Canadian mustard seed crop, mustard seed is a good alternative cash crop to traditional grains and oilseeds.

In 2000, there were 10,000 acres of mustard seeded and 9,000 acres harvested in the province, up from 7,000 and 5,000 acres in 1999. About 91 percent of Manitoba's plantings were yellow mustard with smaller amounts of brown (2%) and Oriental mustard (7%) varieties.

Mustard seed yields were highest at 1,214 pounds per acre in 1991. Yields, averaging 806 pounds per acre in 2000, were 2 percent below the 1999 yield and 9 percent below the 10-year average of 884 pounds per acre. Harvested area peaked in 1968 with 65,000 acres, while ten years later, production was record high at 64 million pounds. The 2000 mustard crop of 7.3 million pounds was 74 percent larger than the 1999 crop of 4.1 million pounds.

Average mustard seed prices have ranged between $0.095 and $0.182 per pound over the past twenty-five years. The average price decreased from the 1996 record high to $0.137 per pound for the 1999 crop, but rose to $0.152 per pound for the 2000 crop. The 2000 crop was valued at $1.1 million, almost double the 1999 crop value of $0.56 million.

Marketing:

Annual cash receipts for the sector decreased from $2.2 million in 1997 to $0.75 million in 2000, while Manitoba's contribution to Canadian mustard seed receipts declined from 2.3 percent to 1.2 percent over the three years.

Mustard seed is delivered by producers to cleaning plants, such as Northern Sales, which separate and clean the seed to the specifications required by processors. The cleaned seed is shipped in bags or bulk by truck or rail to mustard mills in Hamilton and Montreal in Eastern Canada or to mills in states such as North Dakota and Missouri.

Manitoba markets yellow mustard (also known as white) for processing into American hot dog mustard, which uses the whole seed for a milder product and gets its yellow colour from turmeric. It is also used in processed meats for flavour and as a high-protein extender. The Oriental varieties can be pressed into oil used for cooking in some Asian countries. Brown mustard seed produces a hot mustard used in European products such as Dijon. The kernel of the seed is milled into flour for the hotter mustards. Most name brand, prepared mustards are a custom blend of yellow and Oriental mustard flour.

Processing:

Small amounts of mustard seed are processed in Manitoba. Organic, wild mustard seed is marketed by Crystal River Foods in Clearwater. Processors of prepared mustard in Manitoba include Elman's Food Products in Winnipeg. Venture Seeds Ltd. in Brunkild is a new processor of mustard seed in Manitoba since 1999. Venture Seeds offers contract production as well as spot price purchasing of yellow, oriental and brown mustard seed. Venture Seeds cleans and ships raw product to the end user in both the local and international markets.

Trade:

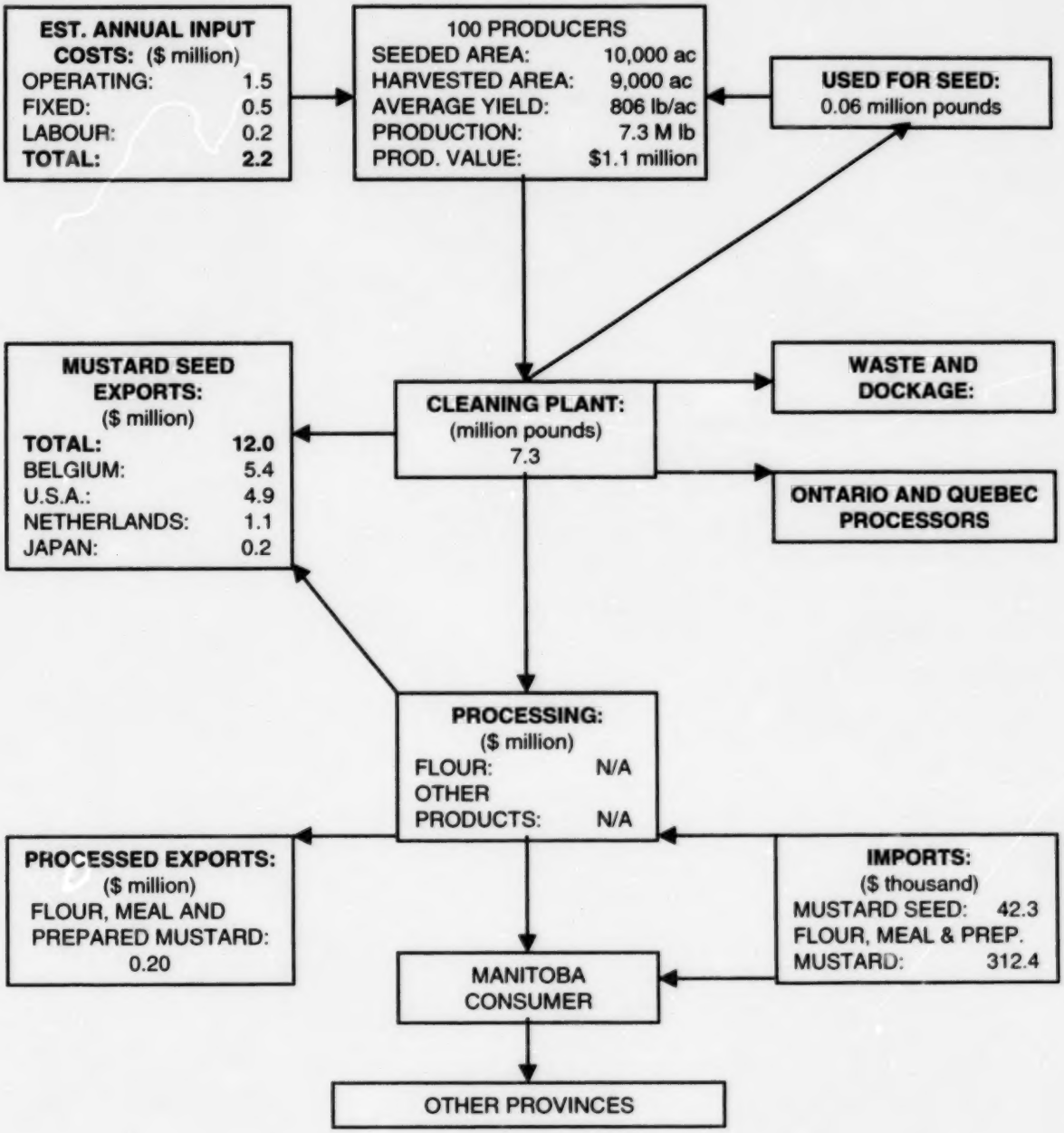
Some of Manitoba's mustard seed is shipped to processors in Eastern Canada, but most of the mustard shipped out of the province in 2000 went to 15 countries, such as Belgium, the United States, the Netherlands and Japan. Exports were valued at $12.0 million in 2000. Mustard flour and prepared mustard, valued at $20,000, were exported to countries such as the United States, Australia and Japan.

Manitoba imported about $42,300 of mustard seed and $312,400 of mustard flour and prepared mustard in 2000, mostly from the United States.

MUSTARD SEED SECTOR

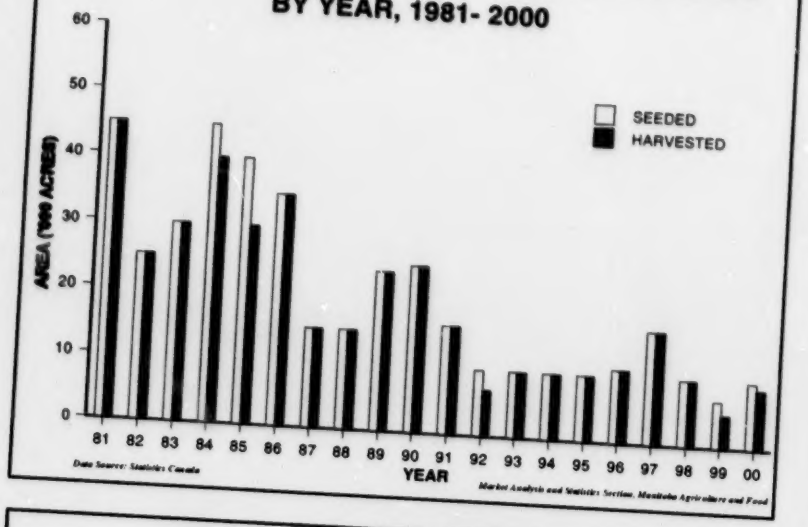
	1997	1998	1999	2000[P]	'00 as a % of '99
Estimated Number of Farms	150	100	70	100	143
CROP PRODUCTION:					
Seeded Area (000 acres):	17	10	7	10	143
% of Canada	2.4	1.4	1.0	1.9	
Harvested Area ('000 acres):	17	10	5	9	180
Yield/acre (pounds):	820	756	820	806	98
Production (million lb):	13.9	7.6	4.1	7.3	174
% of Canada	2.6	1.4	0.6	1.6	
Average Price ($/lb):	0.182	0.168	0.137	0.152	111
VALUE OF PRODUCTION ($ thousand):	2,510	1,240	560	1,100	196
ESTIMATED TOTAL EXPENSES ($/acre):	220.38	221.04	221.31	217.91	98
CASH RECEIPTS ($ million):	2.2	1.5	0.8	0.8	100
% of Canada	2.3	1.7	0.9	1.2	
EXPORTS ($ million):	18.0	13.7	14.4	12.2	85
Mustard Seed	17.8	13.5	14.2	12.0	85
Flour, Meal and Prepared Mustard	0.2	0.2	0.2	0.2	104
IMPORTS ($ thousand):	490.5	352.1	320.2	354.7	111
Mustard Seed	175.3	48.6	73.8	42.3	57
Flour, Meal and Prepared Mustard	315.2	303.6	246.5	312.4	127

MUSTARD SEED INDUSTRY CHART, 2000

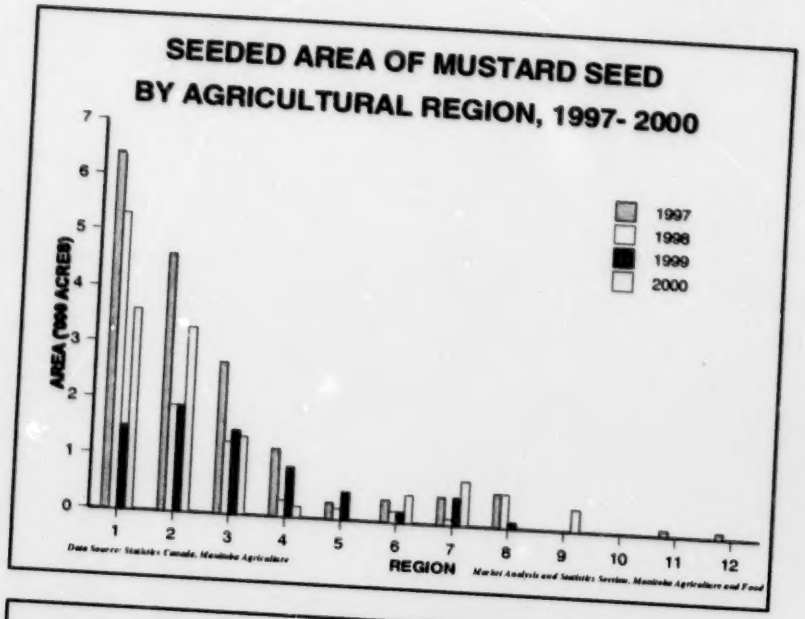


DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

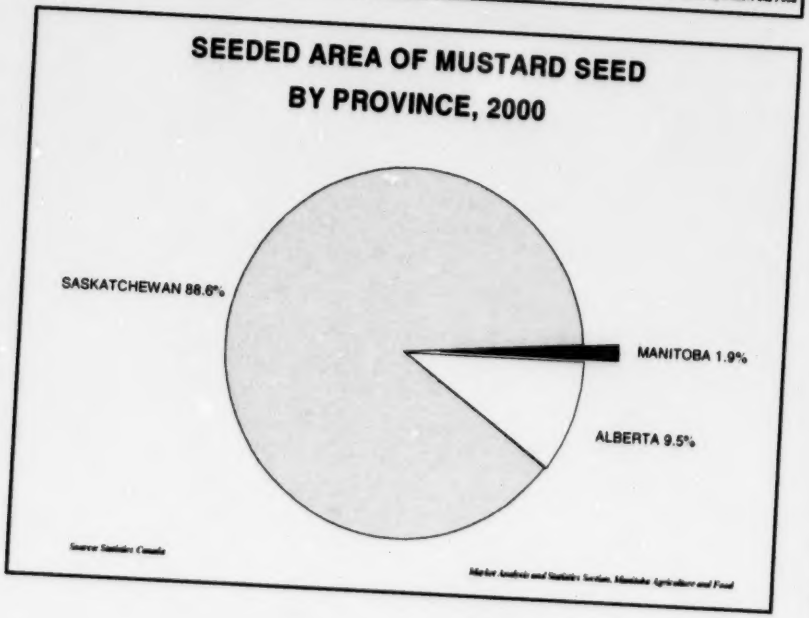
SEEDED & HARVESTED AREA OF MUSTARD SEED BY YEAR, 1981- 2000



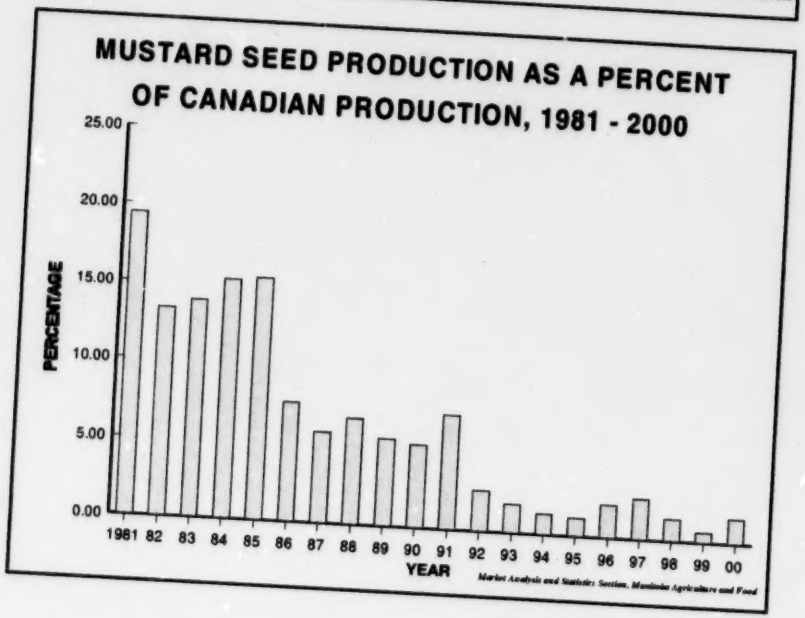
SEEDED AREA OF MUSTARD SEED BY AGRICULTURAL REGION, 1997- 2000

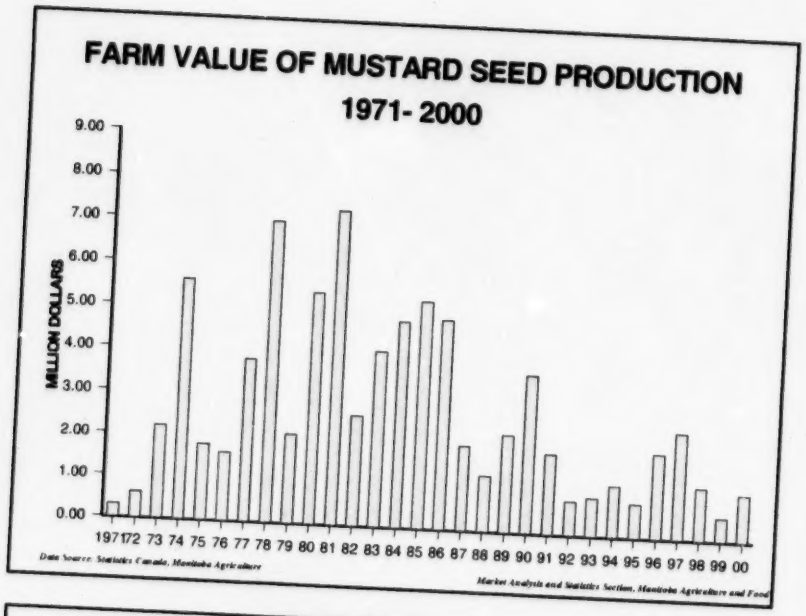


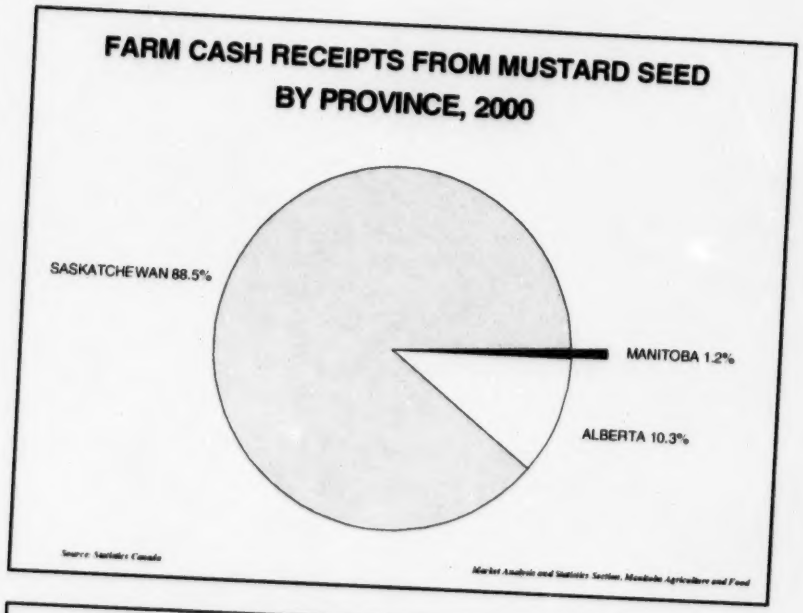
SEEDED AREA OF MUSTARD SEED BY PROVINCE, 2000

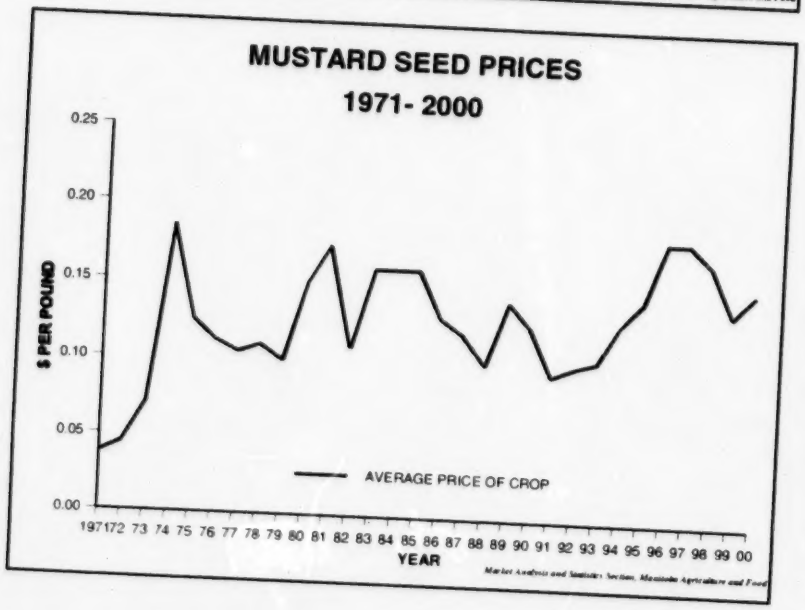


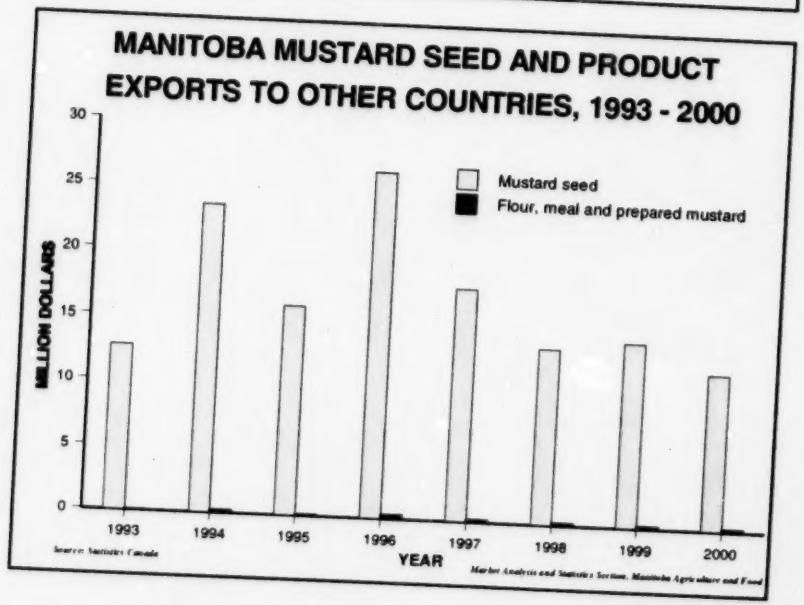
MUSTARD SEED PRODUCTION AS A PERCENT OF CANADIAN PRODUCTION, 1981 - 2000

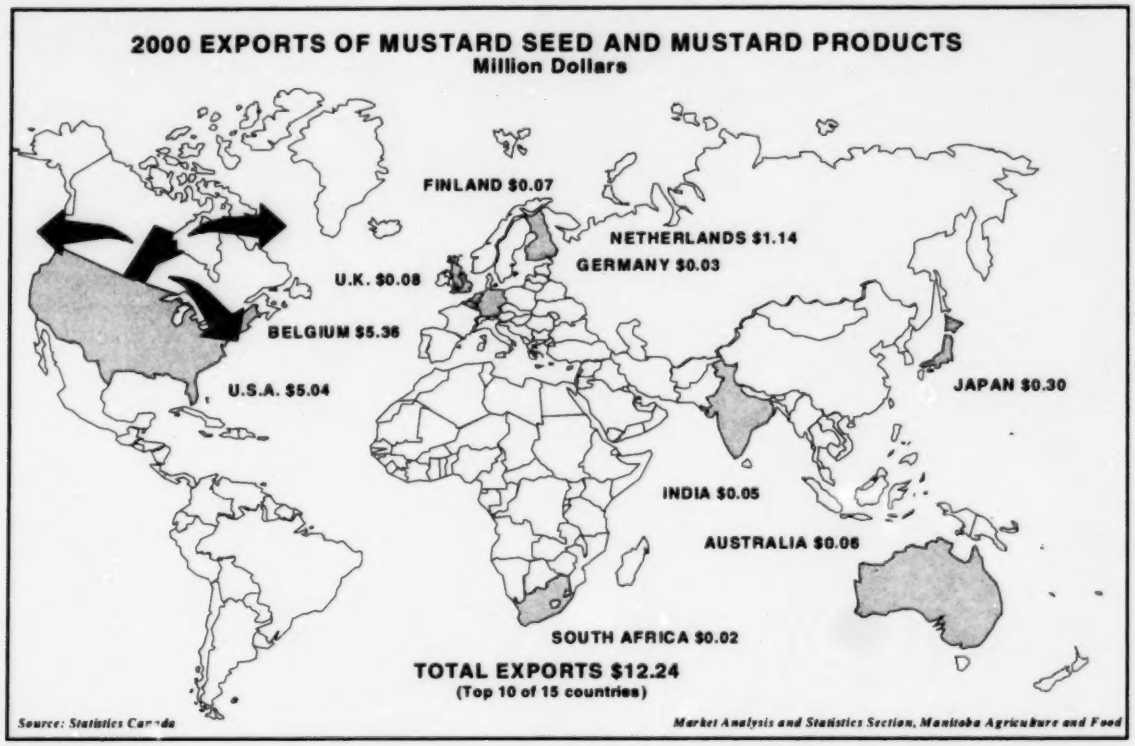


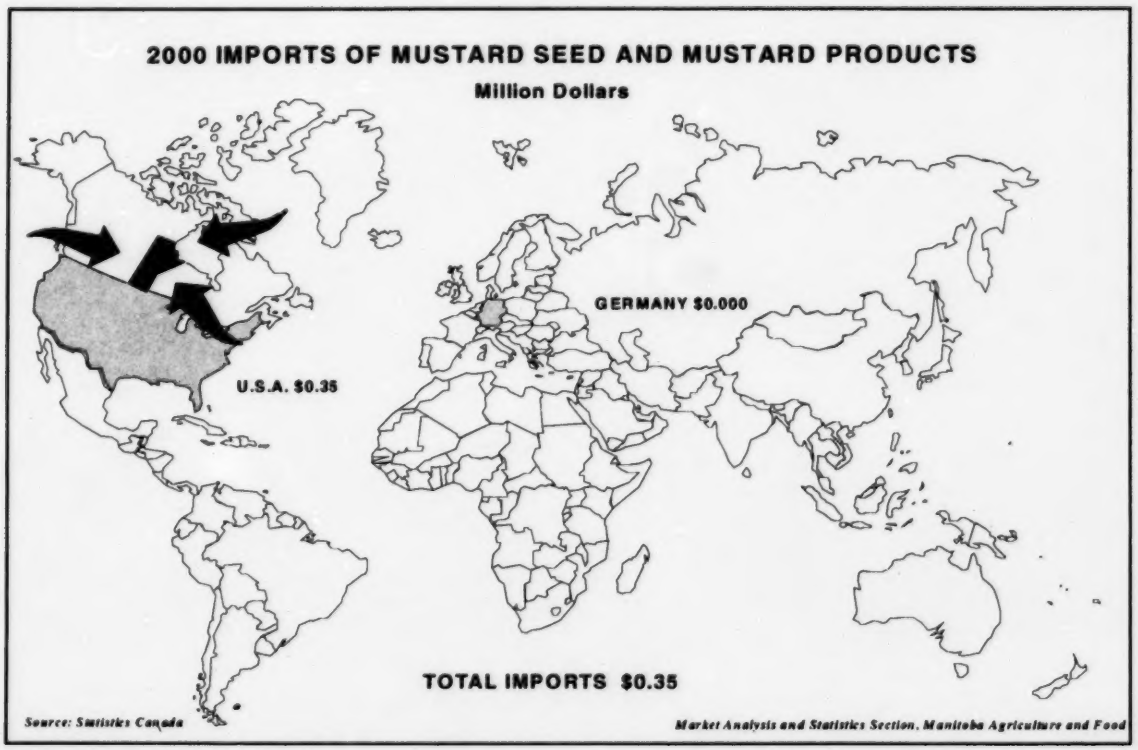

FARM VALUE OF MUSTARD SEED PRODUCTION
1971- 2000
MILLION DOLLARS
9.00
8.00
7.00
6.00
5.00
4.00
3.00
2.00
1.00
0.00
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food


FARM CASH RECEIPTS FROM MUSTARD SEED
BY PROVINCE, 2000
SASKATCHEWAN 88.5%
MANITOBA 1.2%
ALBERTA 10.3%
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

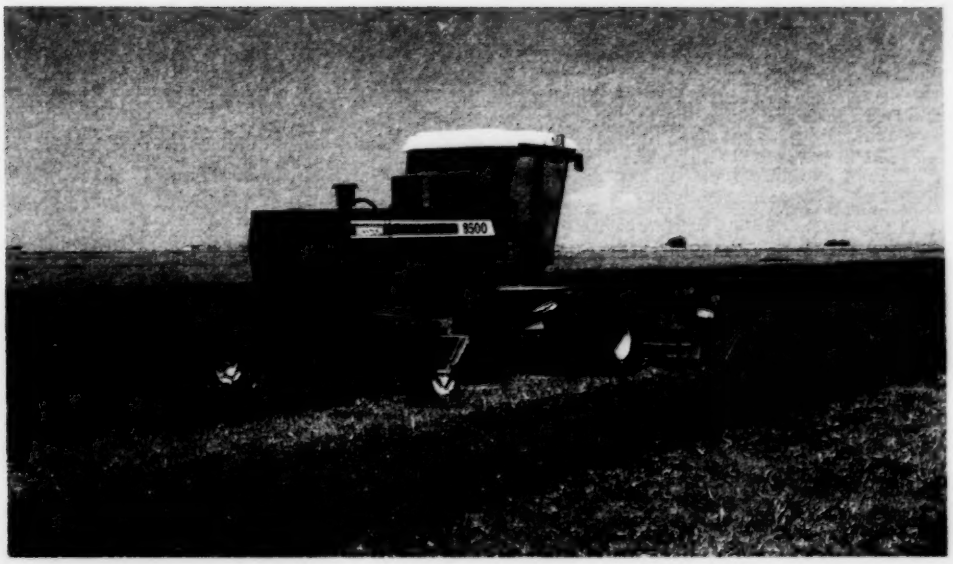

MUSTARD SEED PRICES
1971- 2000
$ PER POUND
0.25
0.20
0.15
0.10
0.05
0.00
AVERAGE PRICE OF CROP
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food


MANITOBA MUSTARD SEED AND PRODUCT
EXPORTS TO OTHER COUNTRIES, 1993 - 2000
MILLION DOLLARS
30
25
20
15
10
5
0
Mustard seed
Flour, meal and prepared mustard
1993
1994
1995
1996
1997
1998
1999
2000
YEAR
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2000 EXPORTS OF MUSTARD SEED AND MUSTARD PRODUCTS
Million Dollars
FINLAND $0.07
NETHERLANDS $1.14
GERMANY $0.03
U.K. $0.08
BELGIUM $5.36
U.S.A. $5.04
JAPAN $0.30
INDIA $0.05
AUSTRALIA $0.06
SOUTH AFRICA $0.02
TOTAL EXPORTS $12.24
(Top 10 of 15 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2000 IMPORTS OF MUSTARD SEED AND MUSTARD PRODUCTS
Million Dollars
GERMANY $0.000
U.S.A. $0.35
TOTAL IMPORTS $0.35
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

FORAGE SECTOR



FORAGE SECTOR PROFILE

Production:

Tame Hay: Manitoba livestock producers have been using native hay and pasture since homesteading in the province began. The first recorded production of tame or cultivated hay was in 1908, when 215,000 tons of hay were produced from 119,000 acres. The crop was priced at $7.40 per ton for a total value of $1.6 million. As cattle numbers increased in the 1920s, so did the area of tame hay, which was slightly over 200,000 acres until 1927 when the area doubled. The area of tame hay increased to around one million acres in the 1960s rising to 1.9 million acres during 1992 to 1998 and over two million acres in 1999 and 2000. Adverse weather conditions in many areas of the province in 1997 reduced hay yields to an average of 0.85 tons per acre. Less than ideal conditions in 2000 resulted in yields of 1.52 tons per acre, 7 percent below the ten-year average yield of 1.64 tons per acre. Hay production in 2000 was estimated at 3.0 million tons, a drop of 20 percent from the 1999 crop. A record average yield of 2.37 ton per acre was recorded in 1986, but tame hay production peaked in 1990 at 4 million tons.

About 75 percent of Manitoba's hay is used for beef production with about 25 percent comprised of various dairy-quality hays. Manitoba produced about 12 percent of the Canadian tame hay crop in 2000, up from 10 percent in 1997.

Average tame hay prices declined from $59 per ton for the 1997 crop to about $50 per ton in 1998 and 1999, but rose to $55 per ton in 2000. Prices were highest at $63.50 per ton during the drought year 1980. The total value of the Manitoba tame hay crop was highest in 1993, at $192.8 million, making it the third most valuable crop in the province that year after wheat and canola. In 1997, due to significantly reduced yields, the hay value of $94.4 million was the lowest level since 1975, but the value increased annually to $187.1 million in 1999. The smaller 2000 crop led to a drop in hay production value to $149.7 million, making hay the fourth most valuable crop in Manitoba in 2000.

Estimated operating expenses for tame hay production rose from $80.25 per acre in 1997 to $80.83 per acre in 1999, but declined to $78.42 per acre in 2000.

Forage Seeds: The first record of commercial forage seed production in Manitoba was in 1936 when the crop was valued at $108,000. The interest in forage seed production grew and by 1979 the crop was valued at over $8 million. Crop area, production and prices varied over the next fifteen years. The crop value went from $14.1 million in 1987 down to a low of $2.4 million in 1993. In 2000, a record 28 million pounds of forage seed, valued at $16 million, were marketed from a record area of 117,400 acres. Alfalfa seed sales (pollinated by alfalfa leaf-cutting bees) were valued at $6.6 million in 2000, followed by Timothy seed at $4.3 million, Rye Grass seed at $2.0 million and Birdsfoot Trefoil seed at $1.0 million. Smaller amounts of Bromegrass, Creeping Bentgrass, Crested Wheatgrass, Kentucky Bluegrass, Meadow Fescue, Reed Canary Grass, Red Clover and Sweet Clover seed are also grown in Manitoba. Manitoba produces about 30-40 percent of the forage seed marketed by Manitoba companies.

Pasture: In 1996, there were 4,086,700 acres of unimproved, native pasture and hayland in the province, down from 4,326,000 acres in 1991. Improved pastureland increased from 843,000 acres in 1991 to 880,300 acres in 1996.

Marketing:

Most of the Manitoba tame hay crop is used for beef and dairy cattle production in the province with small amounts being used for other ruminant species, such as sheep, goats, deer and bison. Only a small portion of the crop is sold out of the province as hay. Some excellent dairy-quality alfalfa and alfalfa-mix hay is exported to the U.S.

Hay is sold from farm to farm, from surplus areas of the province to deficit areas. A hay listing service is provided by Manitoba Agriculture and Food.

Some of Manitoba's alfalfa and Timothy hay is sold to pelleting and compacting plants.

Annual farm cash receipts from the sector reflect only recorded exports of the hay crop, which generally are under-reported. Cash receipts from hay only were estimated at $15.2 million in 2000, down from $15.9 million in 1999. Cash receipts from forage seed sales have been revised to better reflect Manitoba-origin forage seed exports. Receipts increased from $14.9 million in 1997 to $17.9 million in 1999, but declined to $16 million in 2000. Manitoba's contribution to Canadian forage seed receipts rose from 19.2 percent in 1997 to 22.1 percent in 1999 and 21.6 percent in 2000.

Processing:

There are two main processors of alfalfa into pellets and meal, Alfalfa Products Ltd. in Fort Whyte (Winnipeg) and Coldstream Alfalfa Processing, Ltd. in Dauphin. Several compacting plants were operational in 2000, including Sunridge Forage Ltd. in Russell, Canadian Greenfield Forage in Teulon and Lake Winnipeg Hay Company in Fisher Branch. These plants compact Timothy hay mainly for the Japanese and Korean markets. Industry estimates that Timothy hay sales to these two countries in 2000/01 totalled 25,000 tonnes with a farm-gate value of about $2.5 million.

Trade:

Exports of hay to the United States are comprised mainly of high-quality alfalfa and alfalfa-mix bales for the dairy industry. The dairy states in the United States have been reducing their hay area in recent years, which provides an opportunity for Manitoba exporters of high-quality hay. Smaller quantities of compressed hay were sold to Japan, S. Korea and the United Kingdom in 2000. Total 2000 hay exports amounted to $5.6 million, up from $3.2 million the year before.

Exports of alfalfa pellets and meal, mainly to Morocco and the United States, totalled only $0.3 million in 2000, down significantly from $2.2 million in 1996 and $4.7 million in 1992, but up from $0.03 million in 1999.

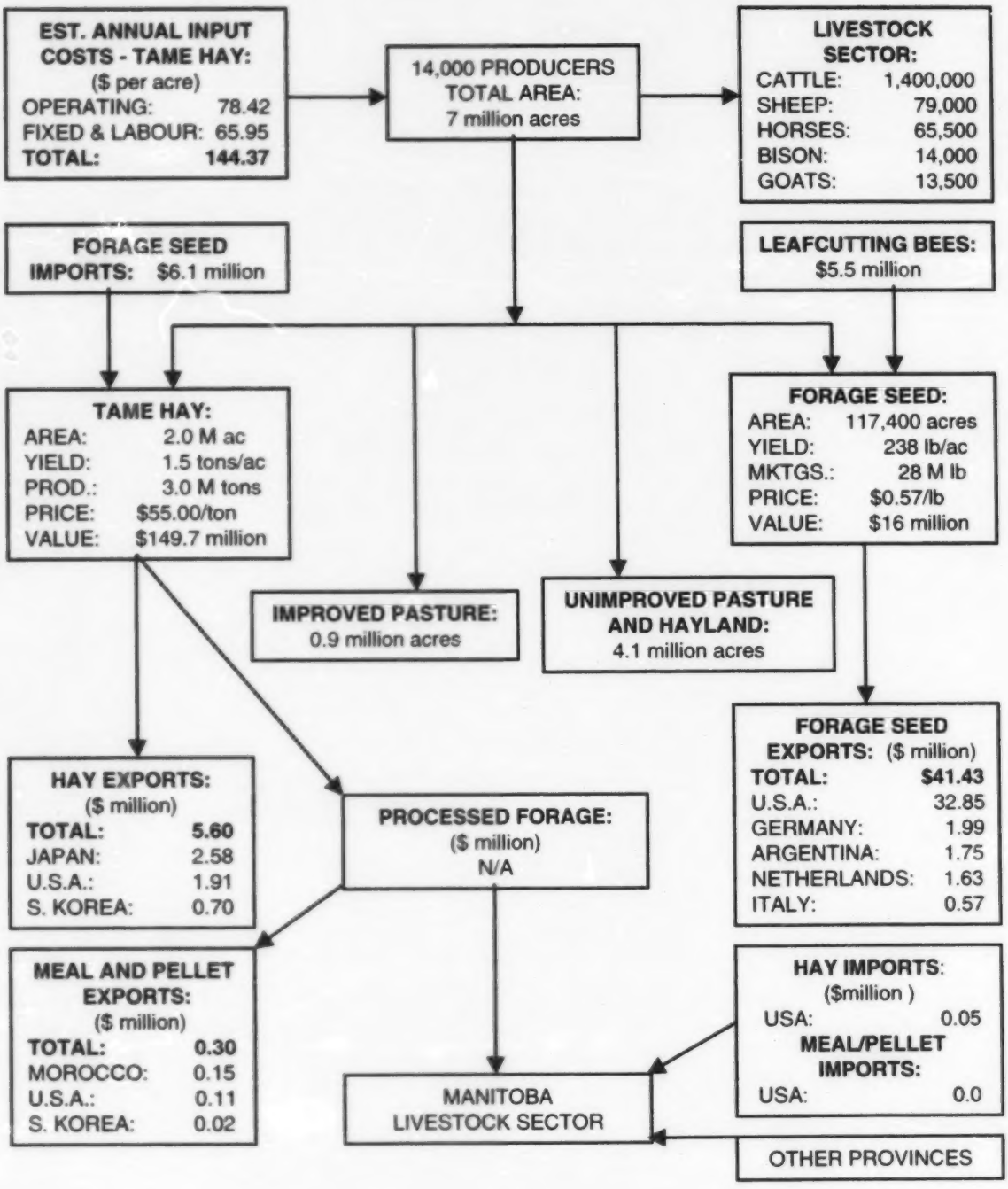
Forage seed export data for Manitoba include seed from other western provinces and small amounts of imported seed. Forage seed exports increased from $17.4 million in 1993 to $41.4 million in 2000. Of 19 countries which purchased forage seeds from Manitoba-based companies in 2000, the United States was Manitoba's most important customer, buying $32.9 million or 79 percent.

Twelve countries supplied Manitoba companies with forage seeds valued at $6.1 million in 2000, the largest supplier being the United States. This was down slightly from 1999. Small quantities of hay were also imported from the U.S. in 2000.

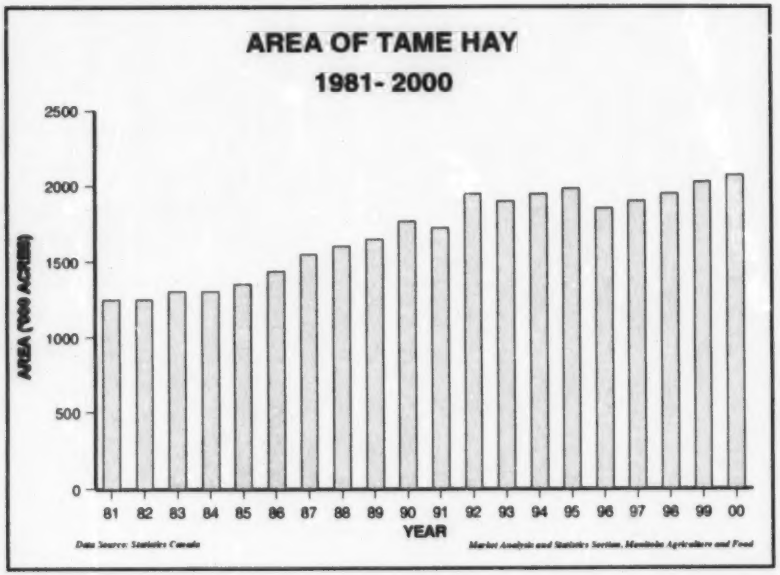
FORAGE SECTOR

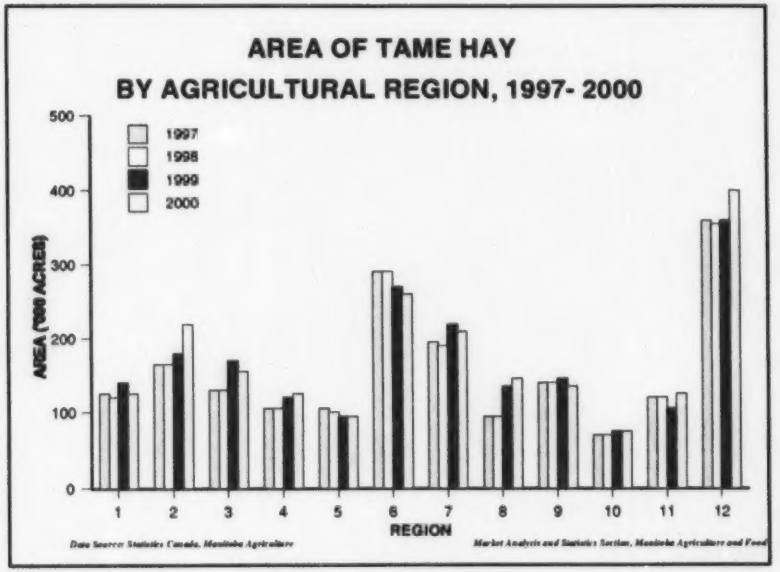
	1997	1998	1999	2000[e]	'00 as a % of '99
Number of Farms with Hay/Forage	14,000	14,000	14,000	14,000	100
TAME HAY PRODUCTION:					
Seeded Area ('000 acres):	1,900	1,950	2,025	2,070	102
% of Canada	12.1	12.2	12.1	11.8	
Harvested Area ('000 acres):	1,900	1,880	1,930	1,970	102
Yield (tons/acre):	0.85	1.62	1.94	1.5	77
Production ('000 tons):	1,600	3,050	3,750	3,000	80
% of Canada	10.2	12.9	12.7	11.8	
Average Price ($/ton):	59.00	50.00	50.00	55.00	110
VALUE OF PRODUCTION ($ million):	94.4	152.4	187.1	149.7	80
EST. OPERATING EXPENSES ($/acre):	80.25	80.49	80.83	78.42	97
CASH RECEIPTS ($ million):	11.7	13.0	15.9	15.2	96
% of Canada	7.3	8.1	9.5	8.2	
FORAGE SEED PRODUCTION:					
Harvested Area ('000 acres):	64.0	70.0	100.9	117.4	116
Yield (lb/acre):	261	230	202	238	118
Marketings ('000 lb):	16,707	15,600	20,360	28,000	138
Average Price ($/lb):	0.89	1.13	0.88	0.57	65
VALUE OF PRODUCTION ($ million):	14.9	17.7	17.9	16.0	89
CASH RECEIPTS ($ million):	14.9	17.7	17.9	16.0	89
% of Canada	19.2	21.4	22.1	21.6	
IMPROVED PASTURE ('000 acres):	880	880	880	880	100
UNIMPROVED PASTURE ('000 acres):	4,087	4,087	4,087	4,087	100
EXPORTS ($ million):	42.8	44.3	42.1	47.3	112
Hay	6.3	3.1	3.2	5.6	175
Alfalfa Pellets and Meal	0.4	0.5	0.03	0.3	1,000
Forage Seeds	36.0	40.7	38.8	41.4	107
IMPORTS ($ million):	3.0	4.6	6.8	6.2	91
Hay	0.1	0.05	0.08	0.05	63
Alfalfa Pellets and Meal	0.0	0.0	0.0	0.0	
Forage Seeds	2.9	4.5	6.7	6.1	91

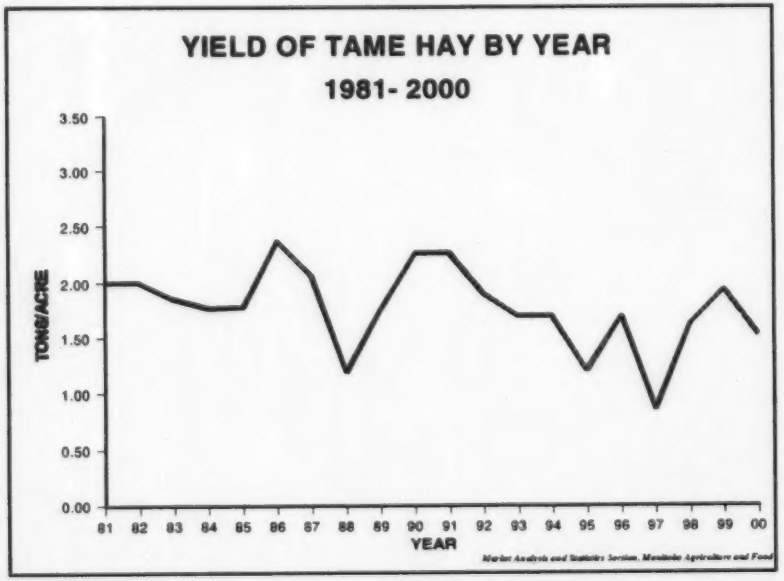
FORAGE INDUSTRY CHART, 2000

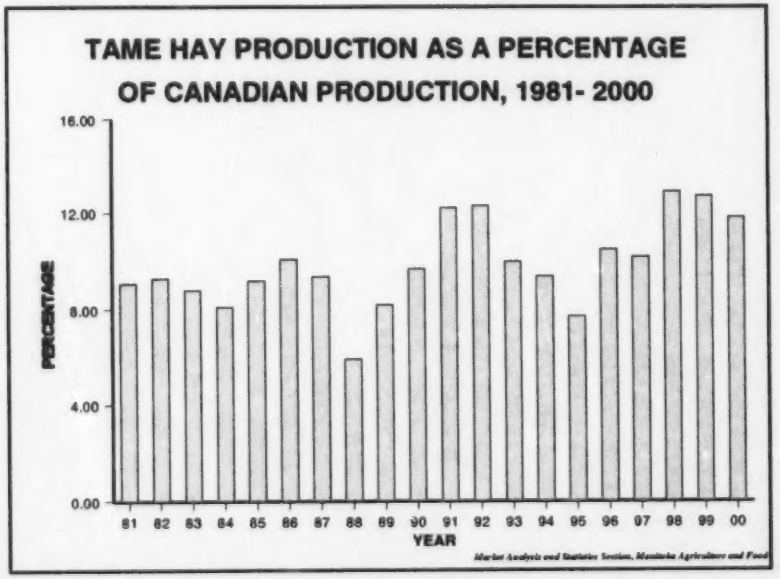


DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

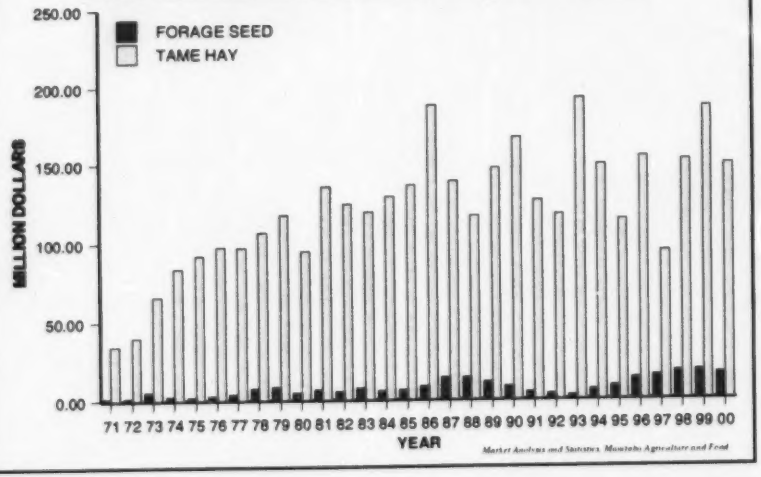

AREA OF TAME HAY
1981- 2000
AREA ('000 ACRES)
2500
2000
1500
1000
500
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR


AREA OF TAME HAY
BY AGRICULTURAL REGION, 1997- 2000
1997
1998
1999
2000
AREA ('000 ACRES)
500
400
300
200
100
0
1 2 3 4 5 6 7 8 9 10 11 12
REGION

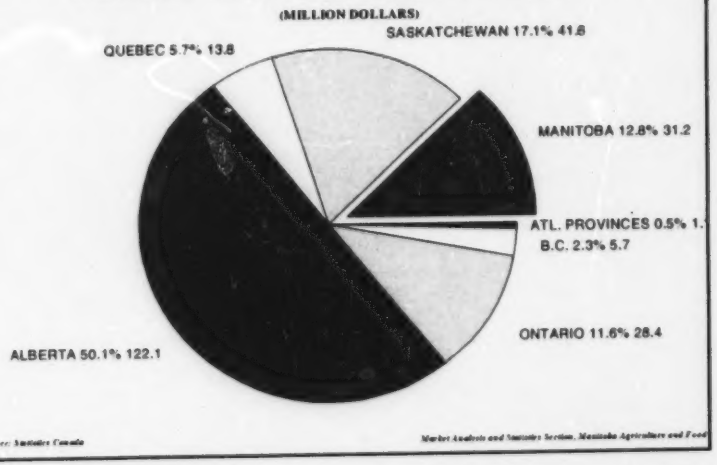

YIELD OF TAME HAY BY YEAR
1981- 2000
TONS/ACRE
3.50
3.00
2.50
2.00
1.50
1.00
0.50
0.00
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR


TAME HAY PRODUCTION AS A PERCENTAGE
OF CANADIAN PRODUCTION, 1981- 2000
PERCENTAGE
16.00
12.00
8.00
4.00
0.00
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR

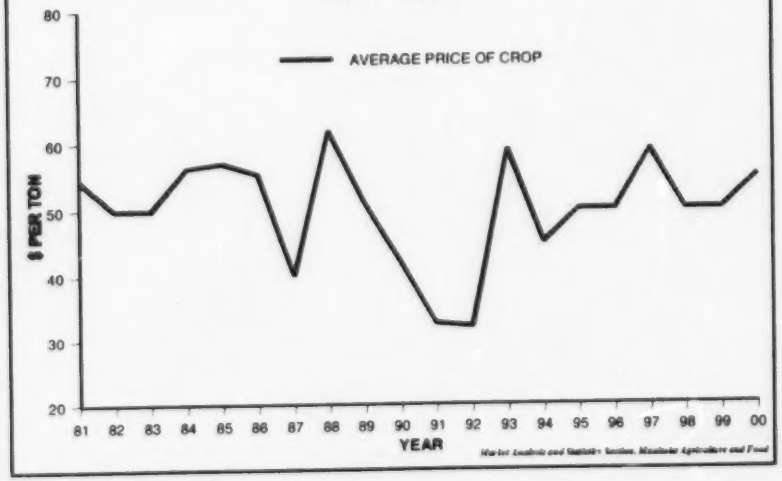
FARM VALUE OF TAME HAY AND FORAGE SEED PRODUCTION, 1971- 2000



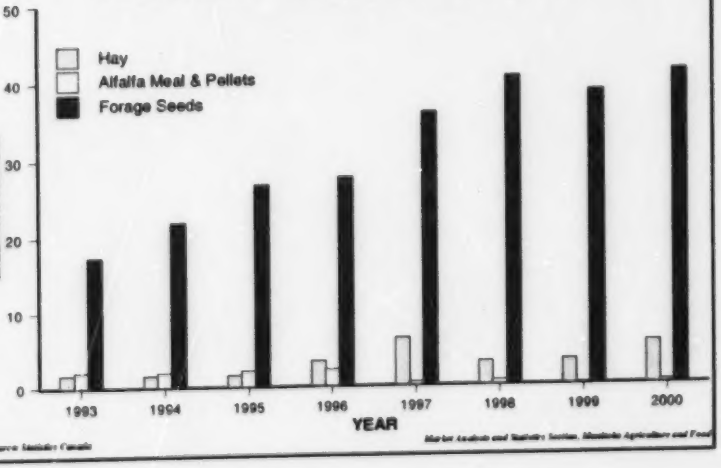
FARM CASH RECEIPTS FROM TAME HAY AND FORAGE SEED BY PROVINCE, 2000

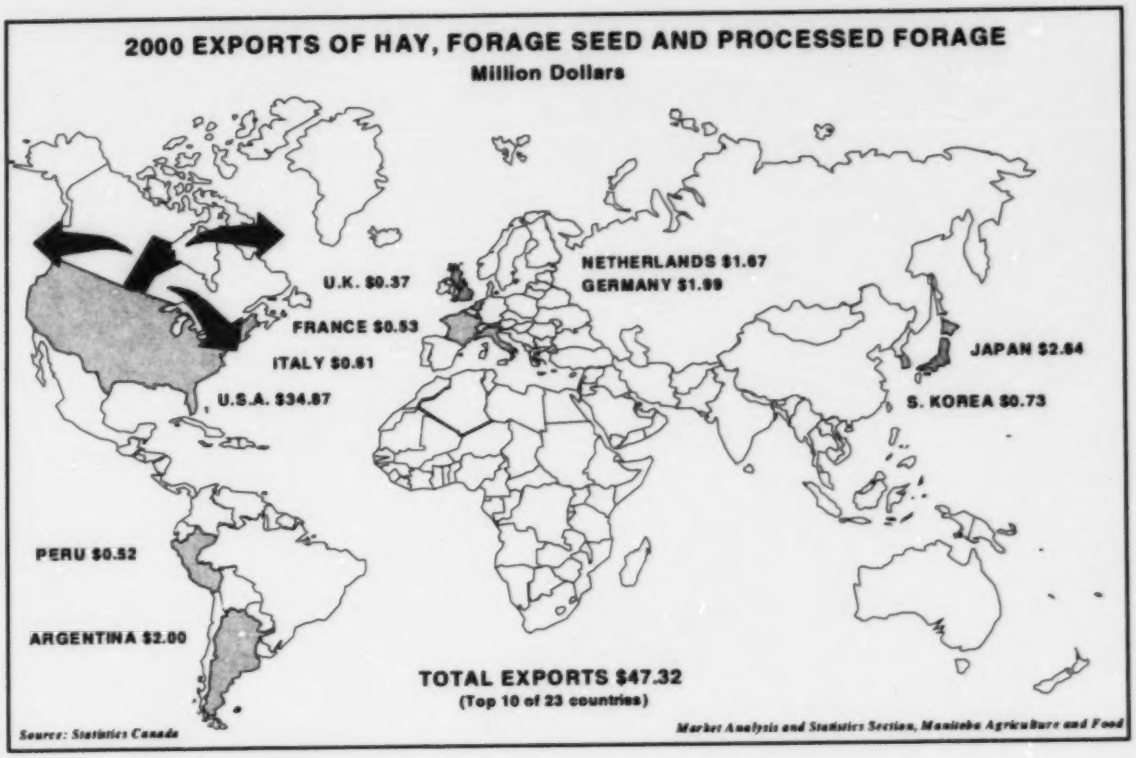


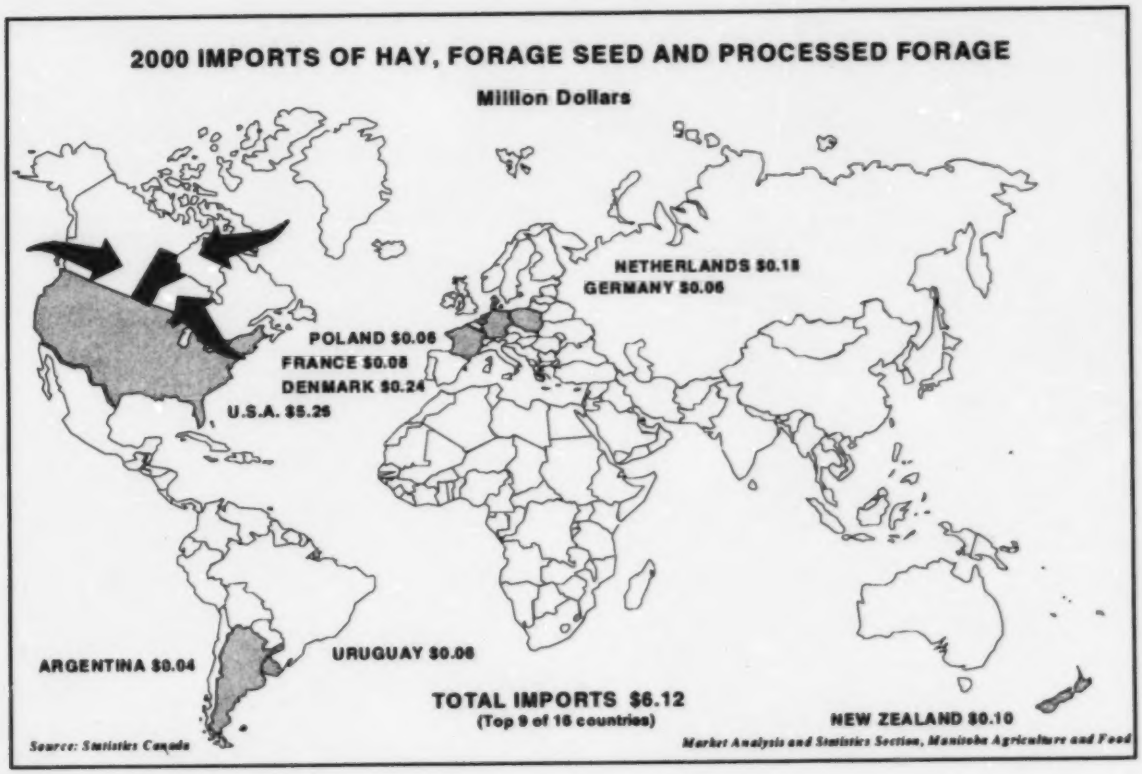
TAME HAY PRICES 1981- 2000



MANITOBA TAME HAY AND PRODUCTS EXPORTS TO OTHER COUNTRIES, 1993- 2000




2000 EXPORTS OF HAY, FORAGE SEED AND PROCESSED FORAGE
Million Dollars
U.K. $0.37
FRANCE $0.53
ITALY $0.81
U.S.A. $34.87
NETHERLANDS $1.67
GERMANY $1.99
JAPAN $2.64
S. KOREA $0.73
PERU $0.52
ARGENTINA $2.00
TOTAL EXPORTS $47.32
(Top 10 of 23 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2000 IMPORTS OF HAY, FORAGE SEED AND PROCESSED FORAGE
Million Dollars
NETHERLANDS $0.18
GERMANY $0.06
POLAND $0.06
FRANCE $0.08
DENMARK $0.24
U.S.A. $5.26
ARGENTINA $0.04
URUGUAY $0.06
TOTAL IMPORTS $6.12
(Top 9 of 16 countries)
NEW ZEALAND $0.10
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food